



Appendices for the Waller County Comprehensive Strategic Plan

Prepared for:
Waller County, Texas



ECONOMIC
Development



APPENDICES FOR THE WALLER COUNTY COMPREHENSIVE STRATEGIC PLAN

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Prepared for:

Waller County, Texas
836 Austin Street, Suite 203
Hempstead, Texas 77445

Point of Contact:

The Honorable Judge Carbett "Trey" J. Duhon III
T.Duhon@wallercounty.us
979.826.7700

Prepared By:

Texas A&M Engineering Extension Service
Knowledge Engineering
College Station, TX 77845

Point of Contact:

Lisa Mutchler, Program Director
Lisa.Mutchler@teex.tamu.edu
979.458.6710

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APPENDIX I:
WALLER COUNTY, TX: STATE OF THE COMMUNITY
REPORT 2016

WALLER COUNTY, TX
State of Community Report 2016



Background

In 1993 the Department of Landscape Architecture and Urban Planning in the College of Architecture at Texas A&M University, initiated the Texas Target Communities program (TTC) to provide technical assistance to small towns on issues related to land use planning and economic development. Today TTC, in partnership with the Texas A&M AgriLife Extension Service, also works with rural counties and marginalized communities across Texas to provide technical support in keeping with Texas A&M's mission as a land grant university. At the same time it serves as a "real world" learning laboratory for graduate students within coursework on campus. Students gain valuable planning experience while targeted communities receive valuable assistance they could not access otherwise and results in a positive difference in the quality of life for its residents. Communities are chosen for participation in TTC based on demonstrated need and their commitment to the planning process.

The Waller County Strategic Planning Committee (WCSPC), with connections through Prairie View A&M University (PVAMU), contacted The Texas Target Communities (TTC) program at Texas A&M University to develop the Waller County State of Community Report 2016 in anticipation of the development of a county strategic plan. In order to support the strategic planning efforts of Waller County, TTC program associates gathered data from a variety of disciplines related to the present state of the County. The TTC team then analyzed the data to identify potential areas for growth and development.

TTC Staff:

John Cooper, Director and Associate Professor of the Practice

Jaimie Hicks Masterson, Program Coordinator

Gopika Nair, Student Intern

LAUP Faculty:

Dr. Wei Li, Assistant Professor and Coordinator of MUP

LAUP Students:

Qazi Aniqua Zahra

Vrushali Sathaye

Xinhe Ruan

Wayne Day

Qikun Chen

Tamanna Tasnum

Manasvini Thiagarajan

Garrett English

Kelly Trietsch

Executive Summary

Waller County is on the northwest side of Harris County. It offers the best of a rural lifestyle and a short commute to the nation's fourth largest city. Citizens of Waller County enjoy access to many social and economic opportunities already and the outlook for expanding access to opportunities is positive. Waller is set to grow ahead of the state and H-GAC 8 by 2050. The County expects an increasing Hispanic population, a trend seen throughout Texas. Approximately 34% of the population in Waller is college educated and 46% of residents are enrolled in schools and colleges. Waller County is a home to PVAMU and four (4) independent school districts (Hempstead, Royal, Katy and Waller).

Proximity to Houston plays an important role in the economy of the County. Manufacturing and agriculture sectors lead the economy. These sectors are more specialized in the County in comparison to Texas. Education services follow in level of impact, due to the presence of many school districts and PVAMU. Employment 'by place of residence' has increased significantly by 40%, from 2004 to 2014. Texas in comparison increased by 25% over that span and the nation only increased by 13%.

Roughly, 19% of people in Waller County are living under poverty. Of those in poverty, the City of Prairie View has the most due to the student population at PVAMU. The County does not have many affordable housing units, but 40% of all homes are under \$100,000. The City of Houston is rapidly encroaching upon Waller County, threatening to disrupt the rural lifestyle many County residents enjoy. As Houston expands, there will be an increase in impervious surface cover, which will increase the risk of flooding.

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1. Introduction

Waller is a rural county bounded on the east by Harris County and the west by the Brazos River. It is situated in the lower plain of southeast Texas, with 513 sq. miles of land and 4.4 sq. miles of water. The county is bordered by Grimes County to the north, Montgomery County to the northeast, Fort Bend County to the south, Austin County to the west and Washington County to the northwest.

The County's climate is temperate, characterized by warm and mild winters. The average temperature in July is 95°F and 39° F in January. The average annual rainfall in the county is 42 inches. Cities in the County include Hempstead, Prairie View, Brookshire, Waller, Pine Island and part of Katy, which also has territory in Harris and Fort Bend County. The County's economy is mainly dependent on farming, cattle, forest products, construction and manufacturing. PVAMU is a major university and a part of the Texas A&M University system.

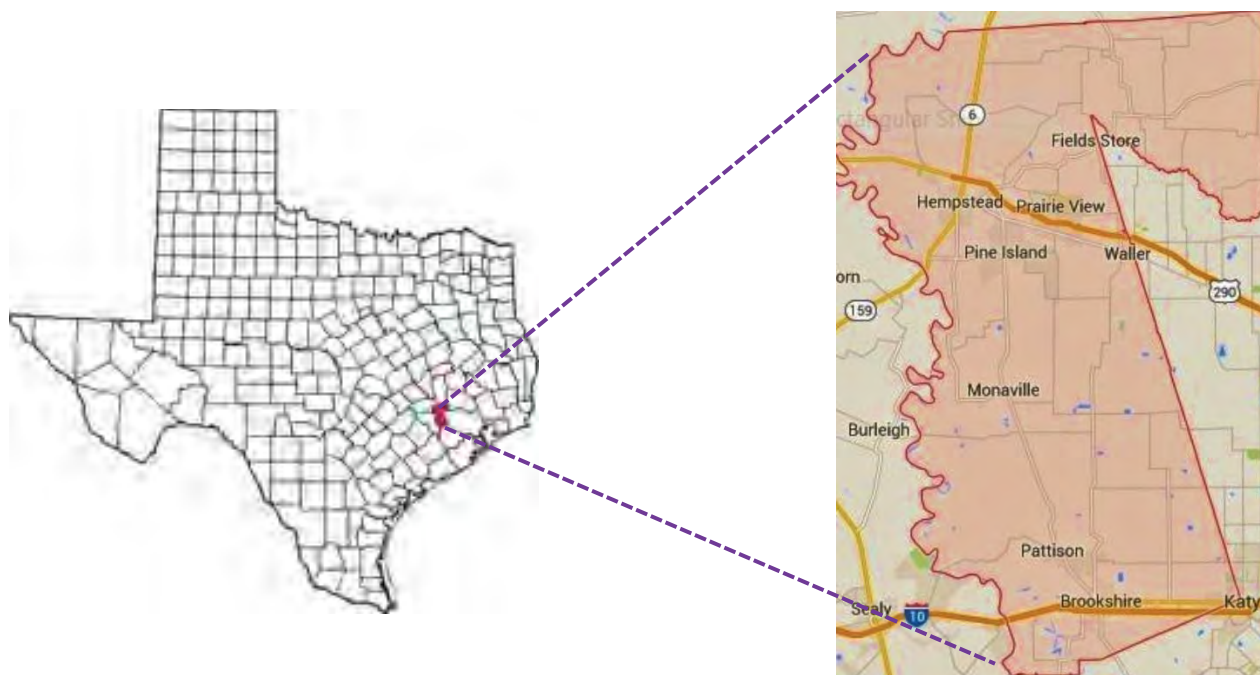


Figure 1.1: Location Waller County, TX

2. History

Waller County was established in 1873. The County began to develop in the late nineteenth century with the implementation of the Houston and Texas Central Railway. The county seat (Hempstead) was developed by the railway companies. The Town of Brookshire began to emerge as a center of activity after the Missouri, Kansas, and Texas Railways passed through the city from Houston in 1893. Today, both railways are property of the Union Pacific Railway network.



Figure 2.1: Courthouse, Hempstead
Source: courthousehistory.com

In the late 1800's, cotton was the major product in the county's economy, along with cattle. Waller County was home to one of the first plantations in the southern part of the country.

The cotton-based economy introduced African-Americans to Waller County as slaves. After emancipation however, many stayed in the area. The 1880 census reported 65% of its population as being African Americans. Today the African-American population in Waller County is 26%.

The participation of African Americans in politics increased and they were elected to county as well as to state offices. Cultural diversity enhanced with immigrants from Central and Eastern Europe, Ireland and Italy arriving in late nineteenth century, together with Germans, Polish and Czech immigrants arriving in the beginning of the twentieth Century.



Figure 2.2: Waller County Courthouse
Source: courthousehistory.com



Figure 2.3: I-10 and I-45

Source: Google Maps, 2016

If the railway helped to develop the area in the beginning of the century, the highways have the same function today. The anticipated, and then actual, construction of the new Highway 290 by-pass from Houston spurred a blossoming population and expansion in the eastern part of Waller County that affected both the Waller Independent School District and the City of Waller. In addition to US 290, Interstate 10 cuts through the Waller County near its southern border. Waller County's position on Interstate 10 (which connects Houston to San Antonio) makes Waller an important piece in the region's economy, and raises the value of advanced planning for county development.

3. Population

3.1. Population Density

The population of Waller County (44,825)¹ is mostly rural with a population density less than 100 people per square mile (Figure 3. 1). The population of Waller County is clustered around the five cities: the City of Hempstead, Prairie View Brookshire, Pine Island and the portion of Katy.² The population density of Waller County (87 per sq. mile) is less than the Texas average (99.9 per sq. mile).³

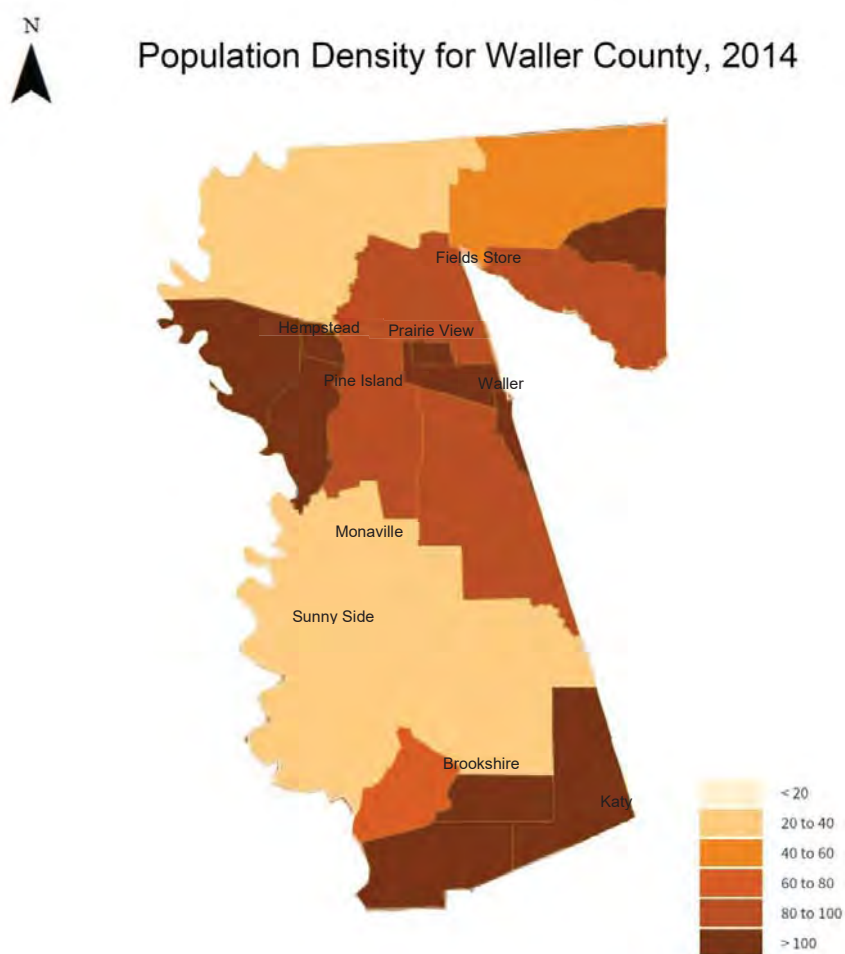


Figure 3. 1: Population Density for Waller County, 2014

Source: 2014 Data from the Social Explorer

¹ 2014 ACS 5- year estimates

² The city of Katy crosses Waller, Harris, and Fort Bend county boundaries

³ Waller County : 87 per sq. mile, Texas: 99.9 per sq. mile (American community Survey, 2010-2014)

3.2. Population Estimates and Projections

In 2014, there were 44,825 people residing in Waller County, increasing from 32,663 people in 2000 and 43,205 people in 2010. The major population centers include portions of Katy (15,071), Hempstead (6,197), Prairie View (5,890), Brookshire (4,804), and Waller⁴ (1,956). Waller grew faster than the Houston- Galveston Area Council (H-GAC) and Texas from 2000 to 2010 and faster than Texas over the entire 2000 to 2014 time period.

Population projections for Waller County obtained from the Office of the State Demographer (OSD) and from H-GAC 8.⁵ are biennial population projections for the state and the County by age, sex, and race/ethnicity. Population projections account for special populations, fertility rates, mortality rates, and residual migration rates each year from 2015 to 2050.⁶

H-GAC also provides projections for 2010 to 2040, which are updated every quarter. These projections include population, employment and land use.

	Estimates		Projections				
	2000	2010	2020	2030	2040	2050	Source
Waller	32,663	43,205	52,133	62,492	74,071	86,862	OSD
			46,114	87,675	1,09,334	-	H-GAC
H-GAC 8	4,669,571	5,891,999	6,865,178	7,886,965	8,921,141	9,955,782	OSD
			7,221,595	8,632,761	10,018,623	-	H-GAC
Texas	20,851,820	25,145,561	28,813,282	32,680,217	36,550,595	40,502,749	OSD

Table 3.1: Population Estimates and Projections for Waller County, H-GAC 8, and Texas (number of persons)

Source: OSD and H-GAC

⁴ The city of Waller crosses Waller and Harris county boundaries

⁵ The H-GAC 8 consists of the following counties: Brazoria, Chambers, Fort-Bend, Galveston, Harris, Liberty, Montgomery, and Waller.

⁶ Three migration scenarios are used to estimate projections. The first, zero (0.0) migration scenario, assumes that immigration and outmigration are equal resulting in natural growth. The second, one-half (0.5) scenario, assumes a growth rate averaging the zero migration scenario and the growth rate experienced from 2000 to 2010. This third (1.0) scenario assumes that the 2000 to 2010 trends in age, sex and race/ethnicity net migration will continue into the future. The Office of the Demographer suggests that the one-half scenario be used for long-term planning purposes.

	Estimates (% change)	Projections (% change)				
	2000 to 2010	2010 to 2020	2020 to 2030	2030 to 2040	2040 to 2050	Source
Waller	32.2	20.7	19.9	18.5	17.3	OSD
	34	17	90	25	-	H-GAC
H-GAC 8	26.2	16.5	14.9	13.1	11.6	OSD
	27	24	20	16	-	H-GAC
Texas	20.6	14.6	13.4	11.8	10.8	OSD

Table 3.2: Population Estimates and Projections for Waller County, H-GAC 8, and Texas (percentage change)

Source: OSD and H-GAC Forecast (2016)

For the most part, Waller is set to grow at a faster pace than the H-GAC 8 and the state as a whole, for each decade through 2050. The H-GAC projection for Waller is highly aggressive for the 2020 to 2030 time period than the OSD 0.5 scenario projections.⁷ Estimates from the 2000 and 2010 Census are presented with projections from both the OSD 0.5 scenario and the H-GAC.

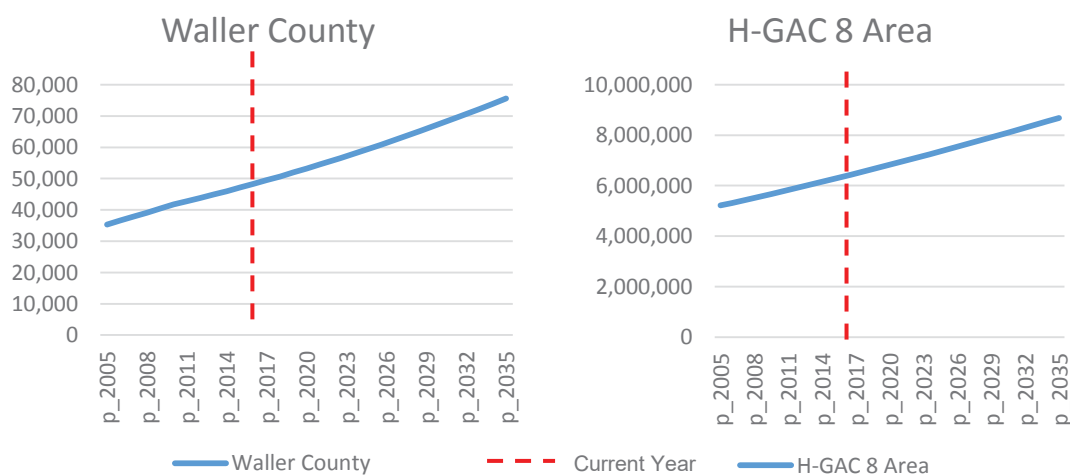


Figure 3.2: Population Projections

⁷ Only during the 2010 to 2020 period does the H-GAC project a substantially lower growth rate for Waller County than for the H-GAC 8.

4. Race

Figure 4.1 shows the distribution of people by race throughout the County. The races are relatively dispersed, though African-Americans are clustered around the larger cities, particularly Prairie View. There are few if any African-Americans in the north-eastern portion of the County.

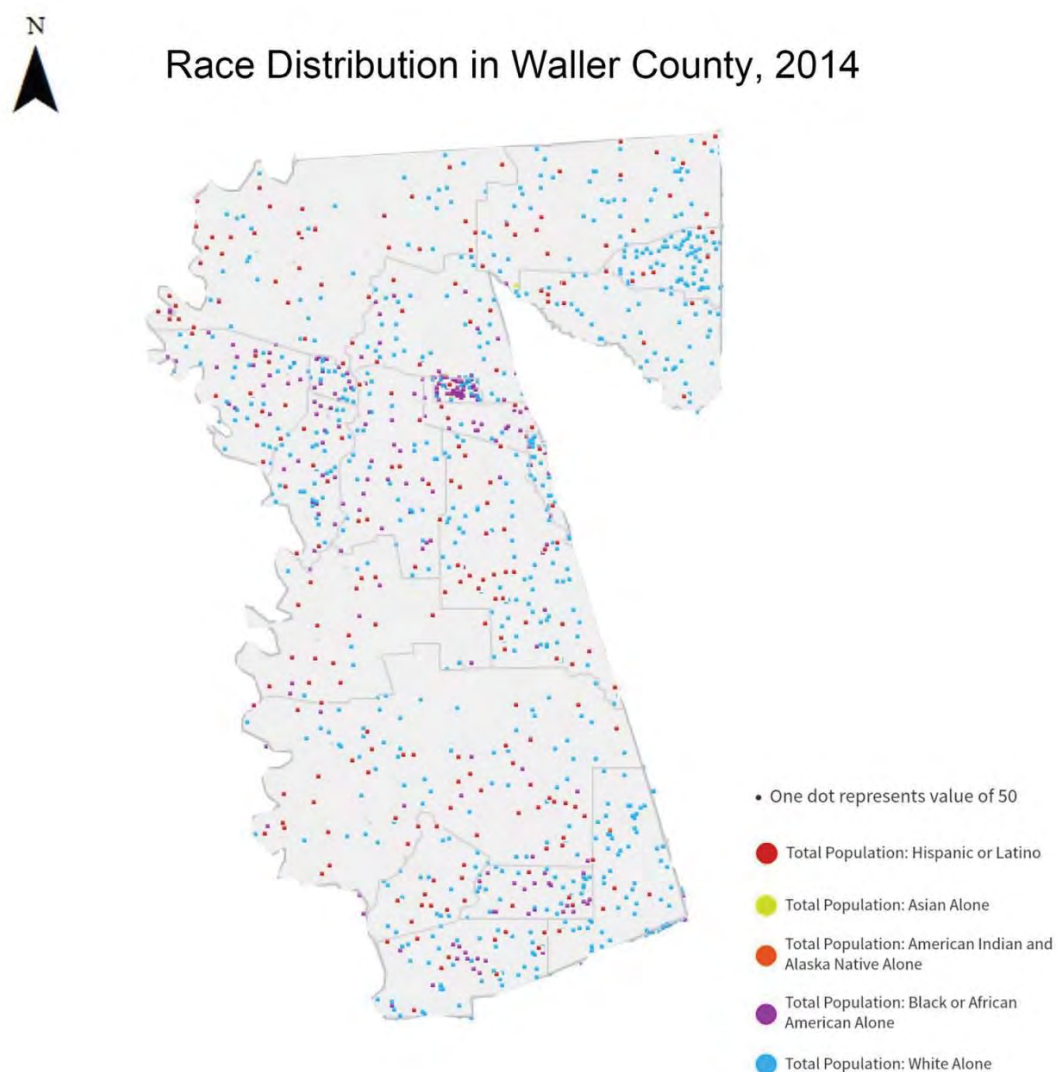


Figure 4.1: Race Dot Map for Waller County, 2014

Source: 2014 Data from the Social Explorer

According to the US Census, Waller County's population is 45% of White, compared to Texas at 44% (Figure 4.2). Waller County has a larger proportion of African-Americans than Texas and smaller proportion of Asian. Although Texas has greater proportion of Hispanics than Waller County. However, by 2050 the County's Hispanic population is projected to be over 50%, which is a consistent trend in Texas.

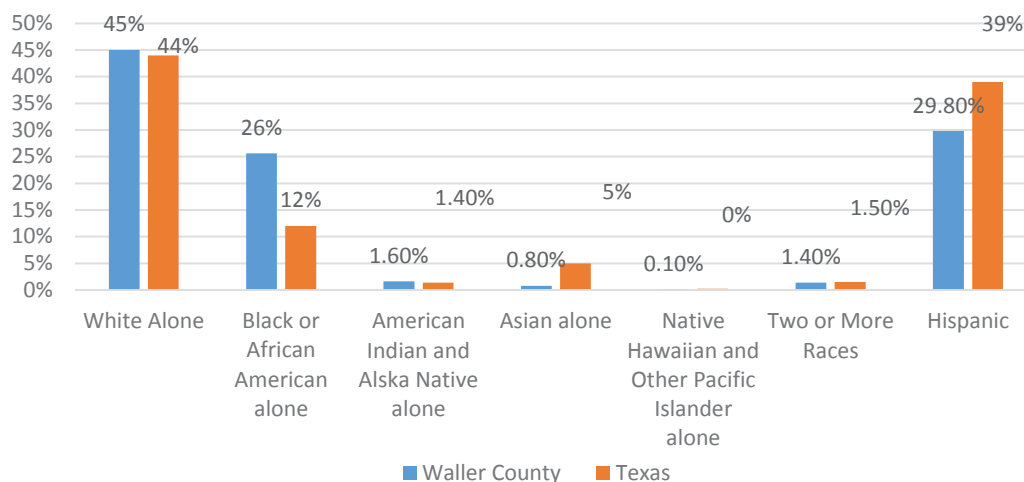


Figure 4.2: Race and Ethnicity by Waller County and Texas

Source: U.S. Census

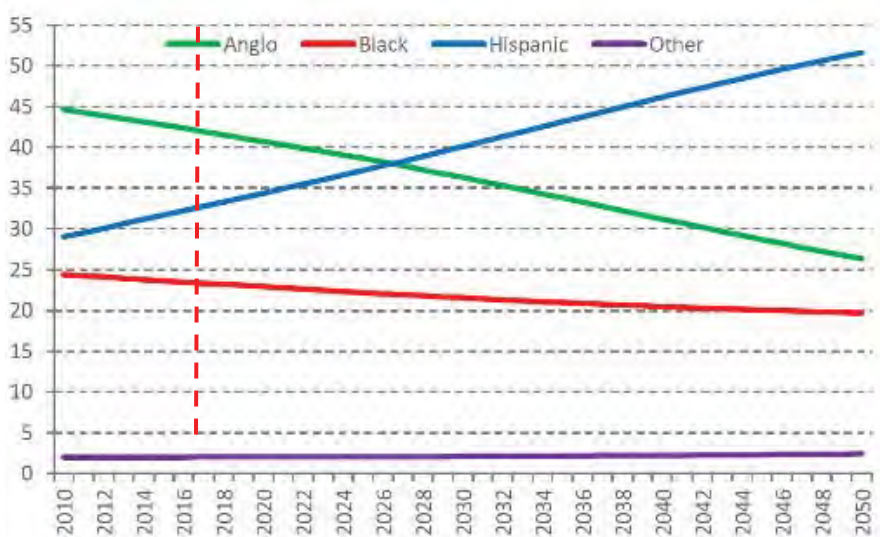


Figure 4.3: Population Projection by Race as a % of Total Population for Waller County

Source: OSD

5. Age Pyramid

The age pyramid for Waller County is shown in Figure 5.1. Waller County has the largest population of recent high school graduates (20 to 24 year olds) compared to surrounding counties likely due to the presence of PVAMU. Waller County also has a large population of children and young people, and a greater proportion of people from 45 to 60 years old when compared to other age groups in the County. There is a much larger proportion of those ages 25 to 44 in Texas than Waller County. The age pyramid for Texas in 2015 is displayed in Figure 5.2.

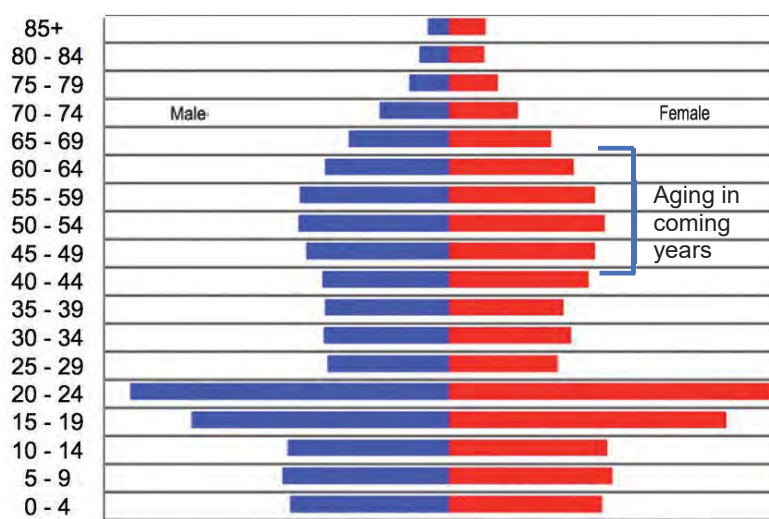


Figure 5.1: Age Distribution in Waller County

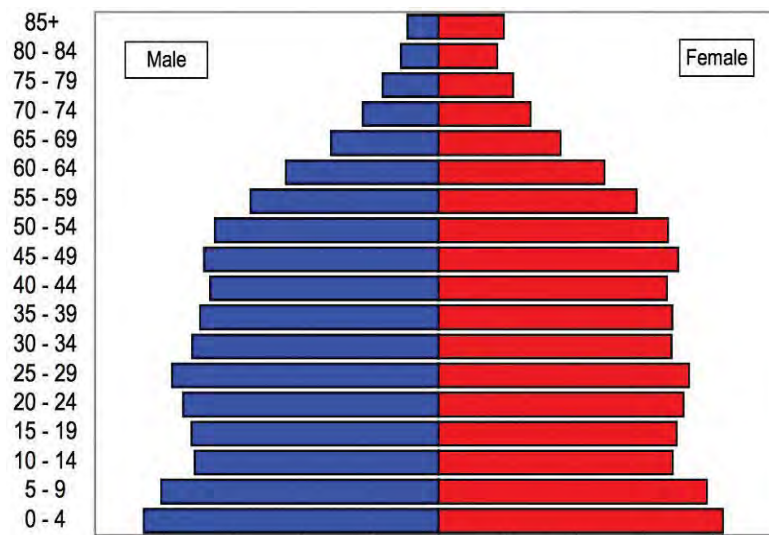


Figure 5.2: Age Distribution in Texas

Source: U.S. Census

Waller County's age and sex distribution slightly resembles a cup shape, which means an aging society. Based on population projections, there will be proportionally more people ages 45 to 64 and 65-plus in the next 20 years—or more mid-career residents, retirees, and elderly. The less than 18, and 25 to 44 age groups will remain relatively stable for the next few years while the 18 to 24 age group is expected to decline. This could be a negative sign as the County will lose its younger population (Figure 5.3).

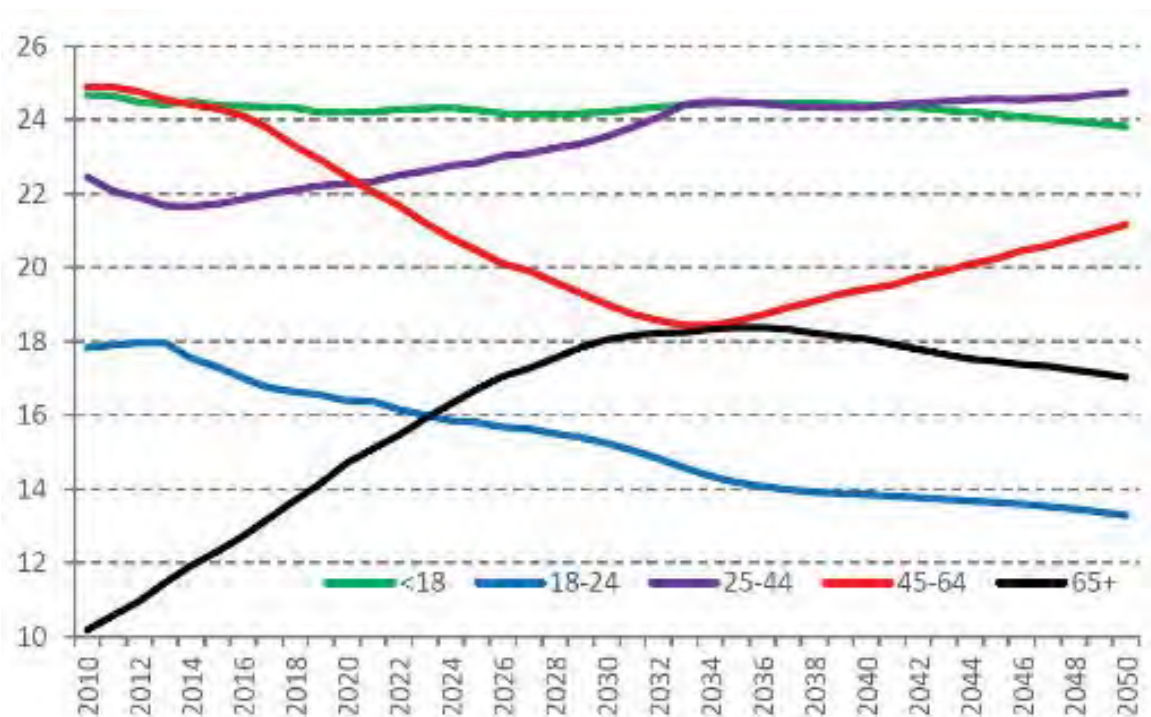


Figure 5.3: Population projections by Age Group (Percentage of Total)

Source: OSD

6. Education

While more (34%) residents have a high school education in Waller than in Texas and the US, Waller falls slightly short of Texas and the U.S. with regard to college attainment. The lower levels of attainment for associate, bachelor and graduate degrees is surprising considering the presence and prominence of PVAMU (see Figure 6. 1).

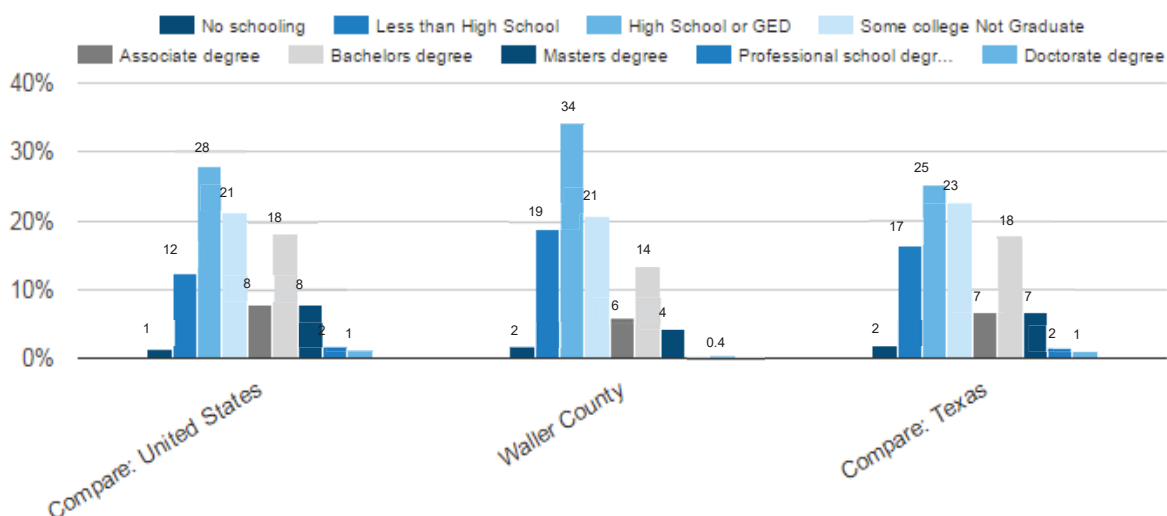


Figure 6. 1: Education; Attainment Detailed Comparison (Age 25+)

Waller County Cities School Enrollment by Aggregate Categories

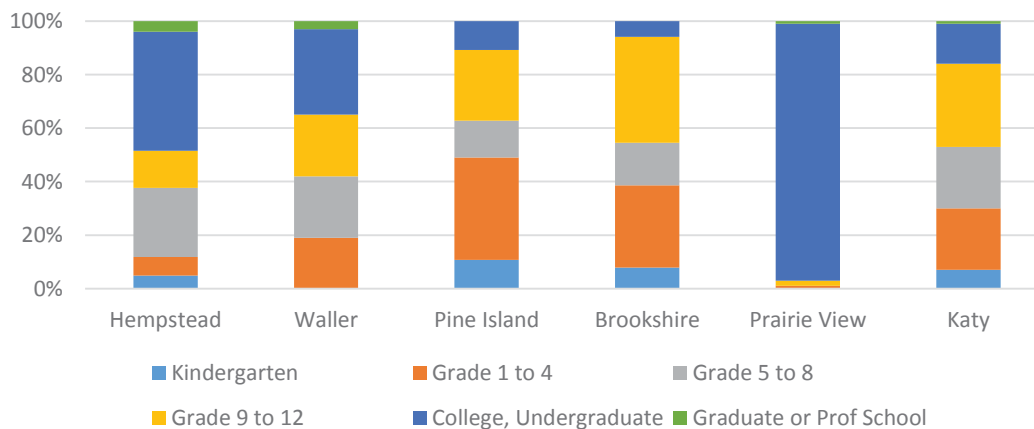


Figure 6.2: Waller County; School Enrollment by Aggregate Categories

Source: U.S. Census Bureau 2014. www.towncharts.com

As observed in Figure 6.2, eighty percent of person's age 25 or older in Waller County are high school graduates. Also, 46% of residents are enrolled in undergraduate programs, which is higher than all neighboring counties: Austin, Washington, Grimes, Harris and Fort Bend. Not surprising, the City of Prairie View, due to the presence of PVAMU has a college population equal to about 95% of all students in school. Other cities have a decent population of school going children between the ages 1-12.

7. Employment

7.1. Overview

As of 2014 there were 23,038 people employed in Waller County, including 17,984 wage and salary employees. Personal income per capita for the county was \$34,078, which has grown by \$10,000 from 2004 to 2014.⁸ Total Employment has increased by 22.7 percent and 43.3 percent since 2009 and 2004, respectively.

	2004	2009	2014
Total Employment	16,078	18,773	23,038
Wage and Salary Employment	12,594	14,550	17,984
Proprietor Employment	3,484	4,223	5,054
Waller County PIPC	\$24,683	\$28,869	\$34,078
Texas PIPC	\$31,077	\$37,037	\$45,669
United States PIPC	\$34,316	\$39,376	\$46,049

Table 7.1: Employment Totals and Personal Income Per Capita (PIPC)

Source: Bureau of Economic Analysis

Major employers in the county include.⁹

- Briarwood- Brookwood Inc.
- Creekside Nursery
- Hempstead ISD
- Igloo
- PBS of Central Florida
- Prairie View A&M University
- Royal ISD
- Waller ISD
- Wal-Mart associates Inc.

The industry sectors with the largest employment are Manufacturing (3,281), Educational Services (2,688), and Construction (1,364).¹⁰

⁸ Bureau of Economic Analysis. (2014). Waller County, TX; Employment figures represent Employment and Personal Income Per Capita by place of residence.

⁹ County profile prepared by the H-GAC as part of "Our Great Region 2040"

¹⁰ LODES; employment by place of work.

7.2. Unemployment Rate

The unemployment rate in Waller County has gone down since 2010, which is a good indicator of the economic growth. As we see in Figure 7.2.1, Texas and Waller County have similar trends. Since 2010 unemployment has dropped from approximately 8% to 4.5% in Waller and 4.7% in Texas.¹¹

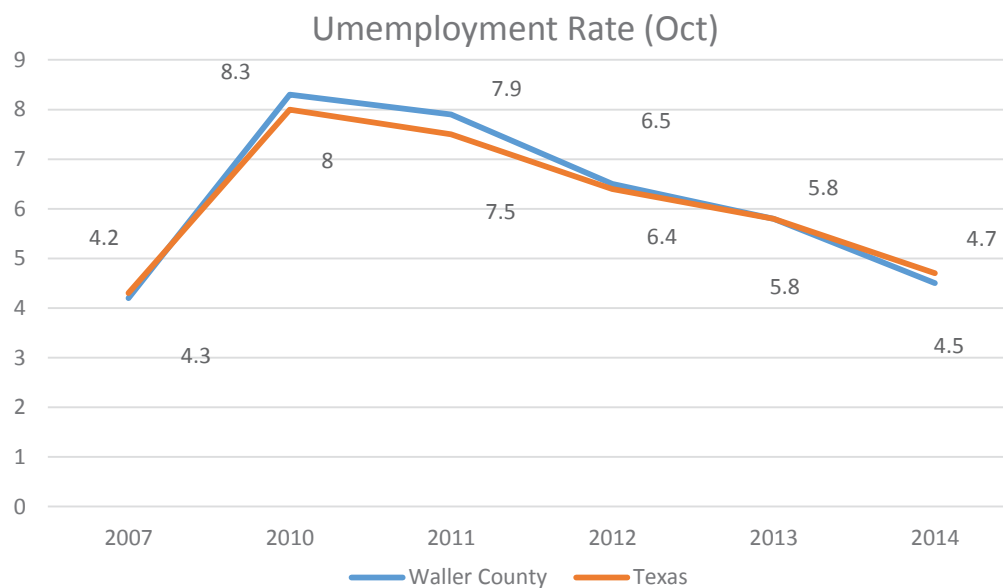


Figure 7.2.1: Trend of Unemployment Rate

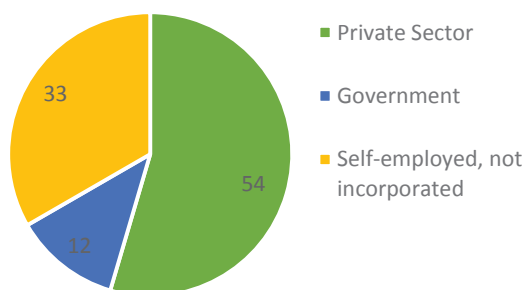


Figure 7.2.2: Types of Workers

In addition, as indicated in Figure 7.2.2, most working people in the County are either self-employed or work for a private company (Figure 7.2.2).

¹¹ Bureau of Labor Statistics 2014

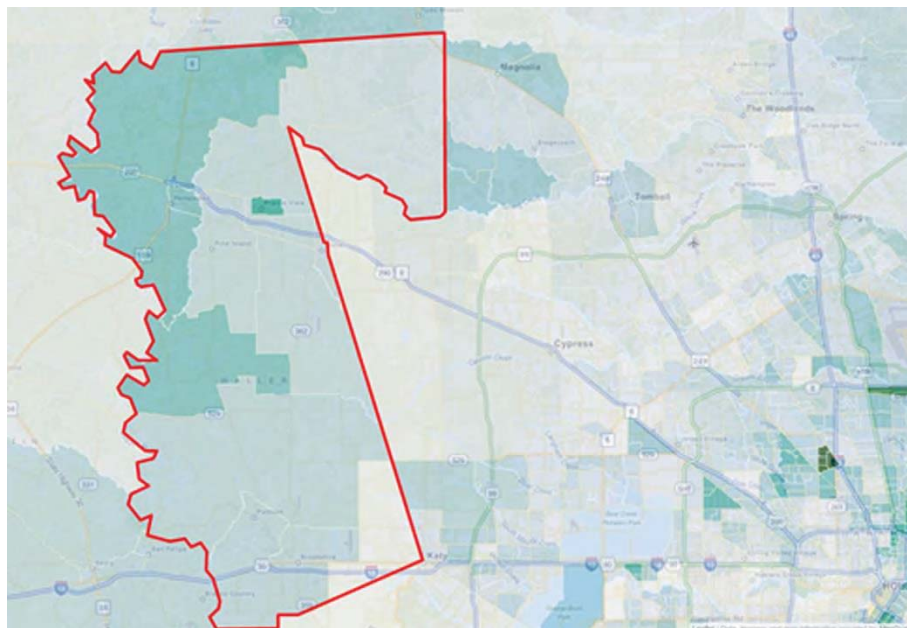


Figure 7.2.3: Unemployment Rate (%)

Source: http://www.city-data.com/county/Waller_County-TX.html

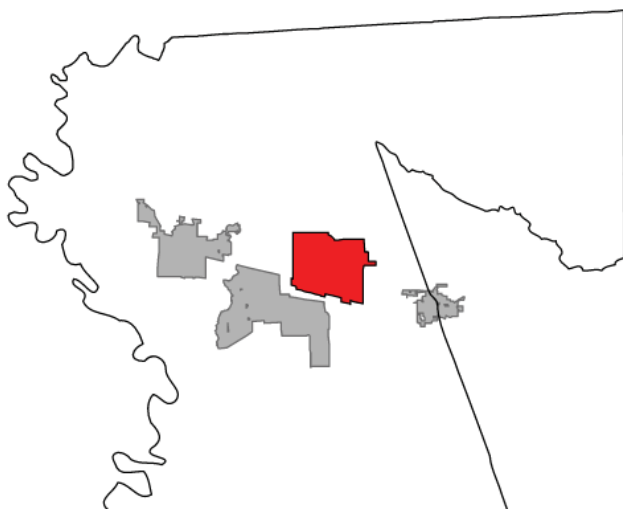


Figure 7.2.3 above indicates that most of the people in the county are employed. Most of the unemployment is concentrated around Prairie View A&M University (Figure 7.2.4) likely due to the presence of students.

Figure 7.2.4: Prairie View A&M Campus

Source: https://en.wikipedia.org/wiki/Prairie_View,_Texas

8. Economy

8.1. Economic Structure

As shown in Figure 8.1.1, five industry sectors provide over 50% of the industry employment shares in Waller County:

- Health Care and Social Assistance,
- Educational Services,
- Retail trade,
- Manufacturing
- Construction.

Among the five, the Manufacturing, Construction and Educational Services have a larger relative percentage of employment shares than Texas.

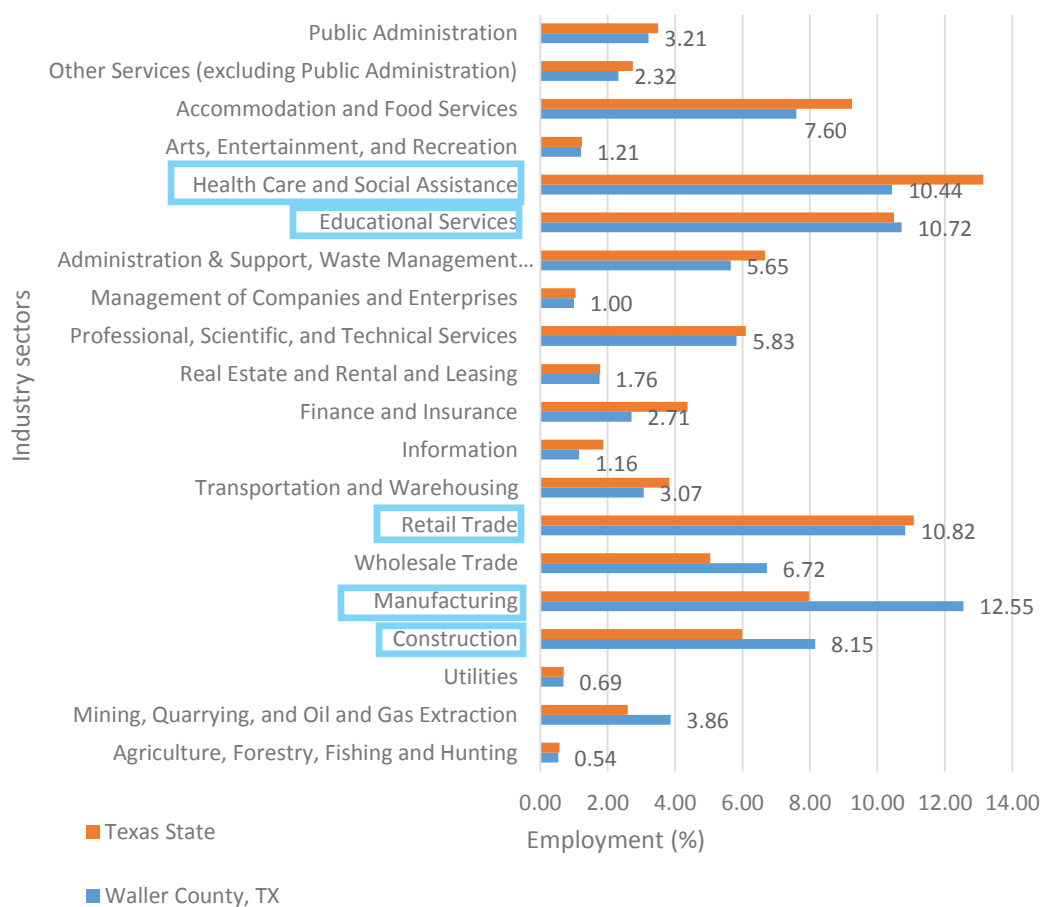


Figure 8.1.1: Employment Shares in Waller County and Texas

8.2. Characteristics of Regional Economy

A location quotient (LQ) is a method to quantify how concentrated a particular industry is in a region as compared to a larger region, such as Texas. A location quotient value greater than 1.0 means that the industry sector is a specialized area compared to the larger region.

	By Place of Work		By Place of Residence	
NAICS Title	LQ 2014 Waller- Texas	LQ 2014 Waller- US	LQ 2014 Waller- Texas	LQ 2014 Waller- US
Agriculture, Forestry, Fishing and Hunting	1.95	1.19	0.95	0.63
Mining	1.32	5.96	1.49	6.51
Utilities	0.38	0.45	0.99	1.17
Construction	1.59	2.09	1.36	1.79
Manufacturing	2.88	2.52	1.57	1.38
Wholesale Trade	1.52	1.78	1.33	1.55
Retail Trade	0.7	0.7	0.98	0.97
Transportation and Warehousing	0.78	0.85	0.8	0.88
Information	0.1	0.08	0.62	0.52
Finance and Insurance	0.19	0.2	0.62	0.64
Real Estate and Rental and Leasing	0.71	0.82	0.99	1.14
Professional, Scientific, and Technical Services	0.41	0.39	0.96	0.93
Management of Companies and Enterprises	0.03	0.02	0.96	0.59
Administrative and Support and Waste Mgmt	0.4	0.43	0.85	0.9
Educational Services	1.79	1.97	1.02	1.13
Health Care and Social Assistance	0.6	0.53	0.79	0.71
Arts, Entertainment, and Recreation	1.09	0.77	0.98	0.7
Accommodation and Food Services	0.64	0.64	0.82	0.83
Other Services(except Public Administration)	0.5	0.44	0.84	0.73
Public Administration	0.46	0.34	0.92	0.67

Table 8.2. 1: Location Quotient by NAICS Industry Codes

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment

Conversely, a value less than 1.0 demonstrates a weakness in the industry sector. The LQ was calculated by dividing the percentage of economic activity in Waller County by the percentage of economic activity of Texas.

Employment by 'place of work' demonstrates the jobs that are available in the county. Alternatively, employment by 'place of residence' indicates the types of jobs residents have, although the jobs are in another county.

Manufacturing boasts the greatest LQ at 2.88 when compared to Texas. Agriculture et al. follows behind at 1.95 and 1.19 when compared to the Texas and the US respectively. Not surprisingly, Education Services has a LQ of 1.79 due to influence of Prairie A&M. Mining is relatively large when compared to the US at 5.96 but not as large when compared to the Mining specialized in Texas. Nonetheless, Waller County has a higher proportion of Mining Jobs than Texas. Other industries Waller specializes in include Construction (1.59) and Wholesale Trade (1.52). All told, Waller County has many specializations pointing to a strong economy.

Of the industrial sectors with an LQ less than one, the most notable industry is Management of Companies and Enterprises (0.03). Most likely, these types of jobs are hosted by nearby Houston, often dubbed the oil capitol of the US. Along with corporate jobs in mining, Houston likely attracts most if not all of the white-collar jobs. Other sectors including Information (0.10) and Finance and Insurance (0.19) are also likely to be stronger Houston.

8.3. Economic Growth

Waller County has benefited from the overall growth in Texas. Shift-share analysis is a tool which complements LQ and economic base analysis. The purpose is to indicate the relative economic growth rate of the region's industries compared to national trends and to determine regional comparative advantages. It determines how much of regional job growth can be attributed to national trends compared to local economic conditions.

In Waller County, employment levels compare exceptionally well to state and national benchmarks. Total employment 'by place of residence' increased by 4,092 or 39.96% from 2004 to 2014. Comparatively, Texas increased by 2,27,109 or 25.14% and the U.S. increased by 15,319,082 or 12.80%.

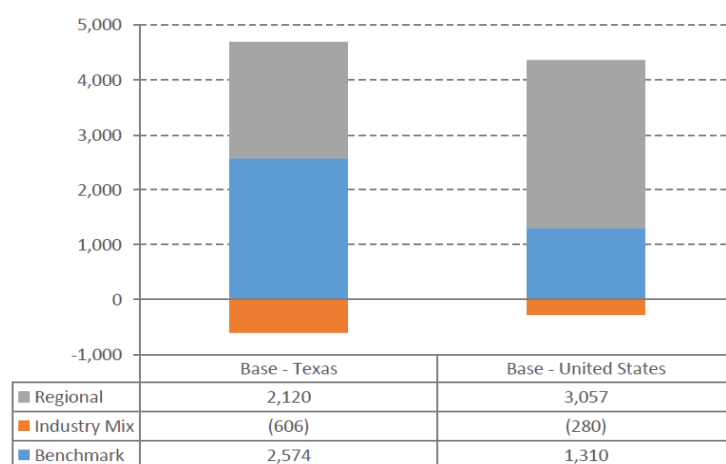


Figure 8.3.1: Shift-Share Analysis for Waller County, 2004-2014

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment

The energy and chemical industries appear to be emerging and dominant in Waller County (Figure 8.3.2). Manufacturing was concentrated in the County as well, in comparison to the nation. Additionally, manufacturing is export-oriented with a base multiplier value of 2.17.¹²

¹² Base Multiplier, is the ratio of the total employment in year to the base employment in that year. Base multipliers are powerful tools in analyzing and forecasting regional economic activity. A higher economic base multiplier implies a larger effect of the basic job creator on the total number of jobs.

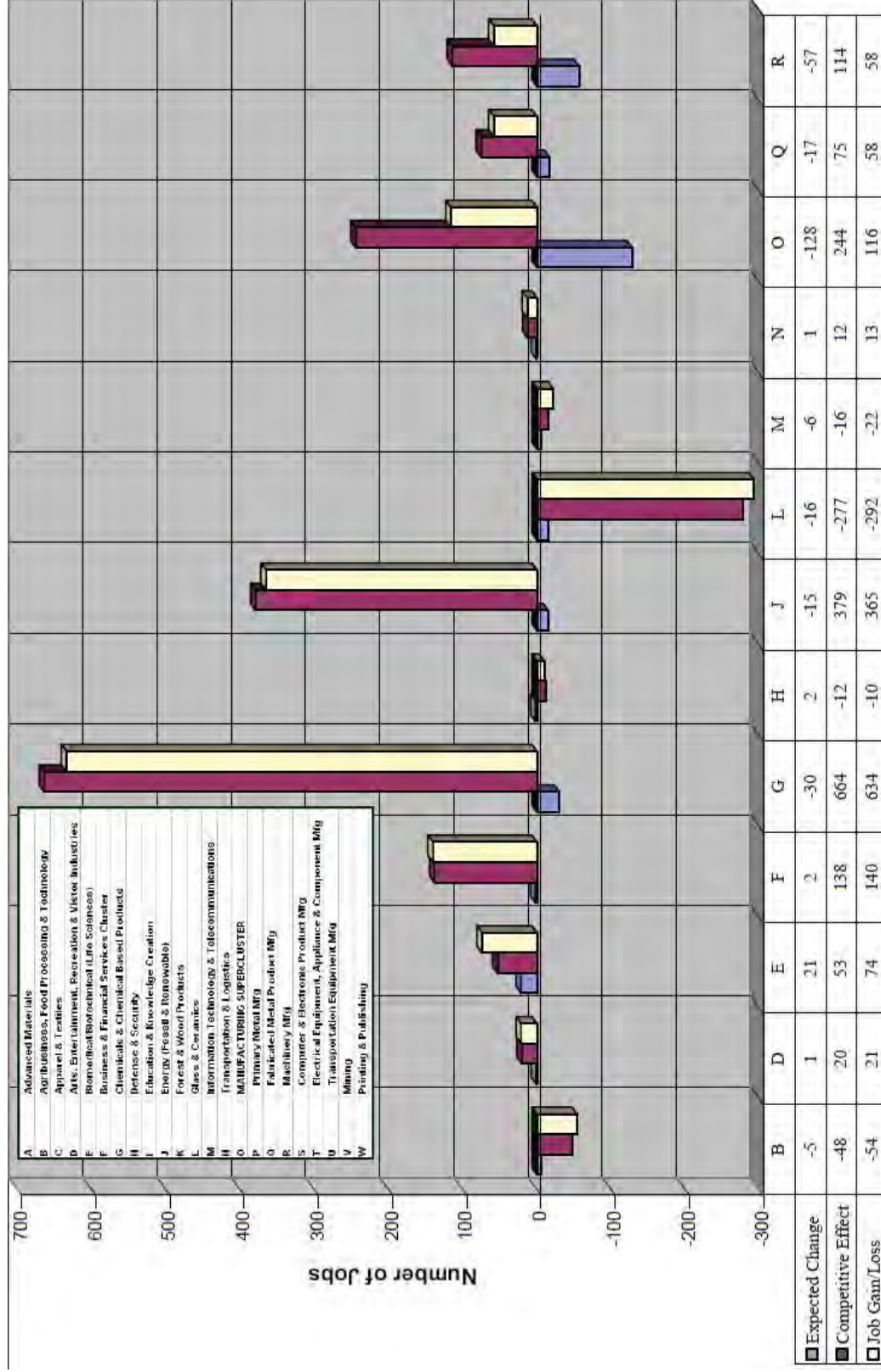


Figure 8.3.2: Shift- Share Analysis of Waller County Industry Clusters as Compared to Texas

Source: https://www.h-gac.com/community/publications/regional_industry_cluster_analysis.pdf

	Downward	Stable	Upward
Poor			
Medium	Matagorda	Liberty, Waller, Wharton	Colorado, Walker
Good		Austin, Brazoria, Chambers, Galveston, Harris, Montgomery	Fort Bend

Table 8.3.1: Distribution of GCEDD Counties Across Nine Types of Economic Performance

Source: https://www.h-gac.com/community/community/publications/regional_industry_cluster_analysis.pdf

The categories in Table 8.3.1 are defined using five variables that measure economic change. Economic performance in Waller and surrounding counties is measured with indicators, such as median household income, average annual wage, unemployment rate, and poverty rate.¹³ Median household income, which includes transfer payments, wages and investment income, measures the economic well-being of a household. Average annual wage on the other hand, indicates compensation levels. The unemployment rate is utilized to assess labor availability information; whereas, poverty rate quantifies the proportion of the population whose family income is below a certain threshold. In addition to the four variables mentioned above, five other indicators are used to measure the economic well-being of a county: average annual change since 2001 for the four indicators mentioned above, plus change in total covered employment from 2001 to 2005. The economic performance analysis indicates that most of the counties in the region with the exception of Matagorda County are performing well. The County should use these indicators to monitor improvements overtime.

¹³ GCEDD: Gulf Coast Economic Development District; https://www.h-gac.com/community/community/publications/regional_industry_cluster_analysis.pdf

8.4. Job Density and Inflow/ Outflow

Employment sectors were concentrated in the six cities (Prairie View, Pine Island, Hempstead, Waller, Brookshire and a part of Katy) (Figure 8.4.1).

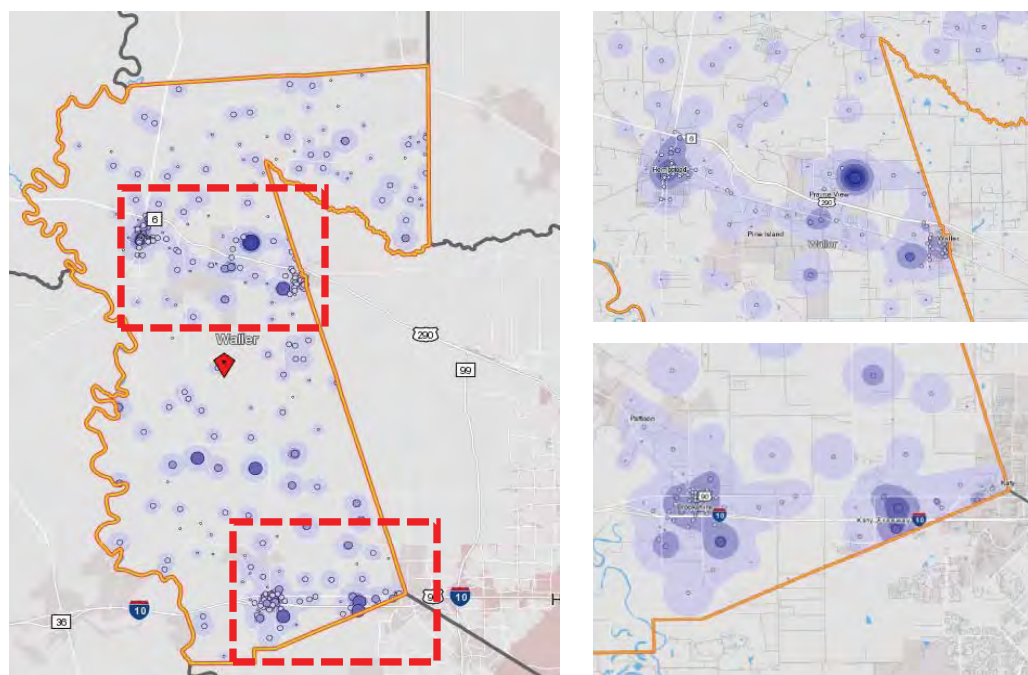
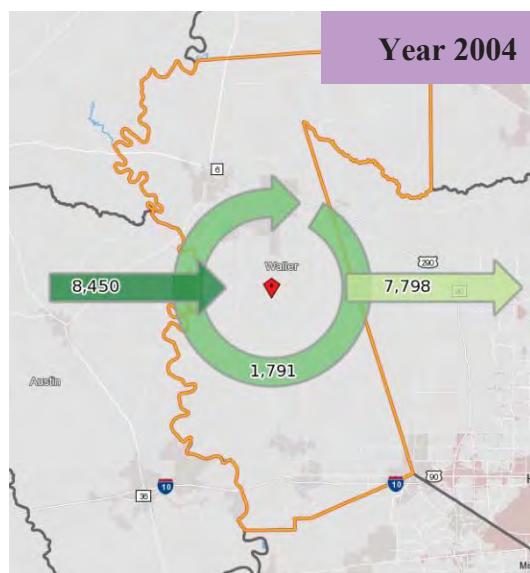


Figure 8.4.1: Major Employment provision areas in Waller County

Source: <http://onthemap.ces.census.gov/>

While the discussion thus far has focused on the jobs available inside Waller County, it is also important to understand the inflow and outflow of employees. In addition, there are three categories of employees (Figure 8.4.1):

- 1) Live and work in Waller,
- 2) Live in Waller and work outside of Waller,
- 3) Live outside of Waller and commute to Waller to work.



Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics

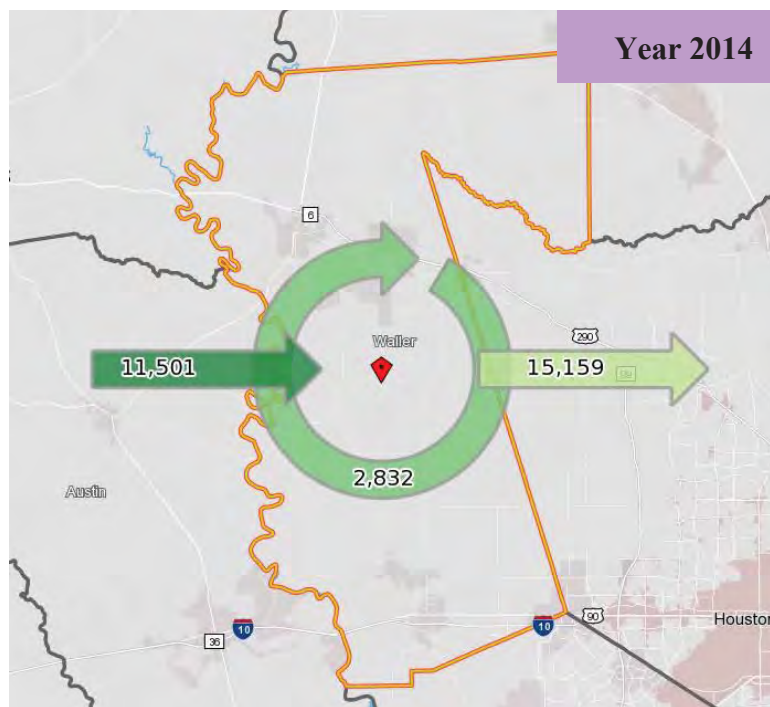
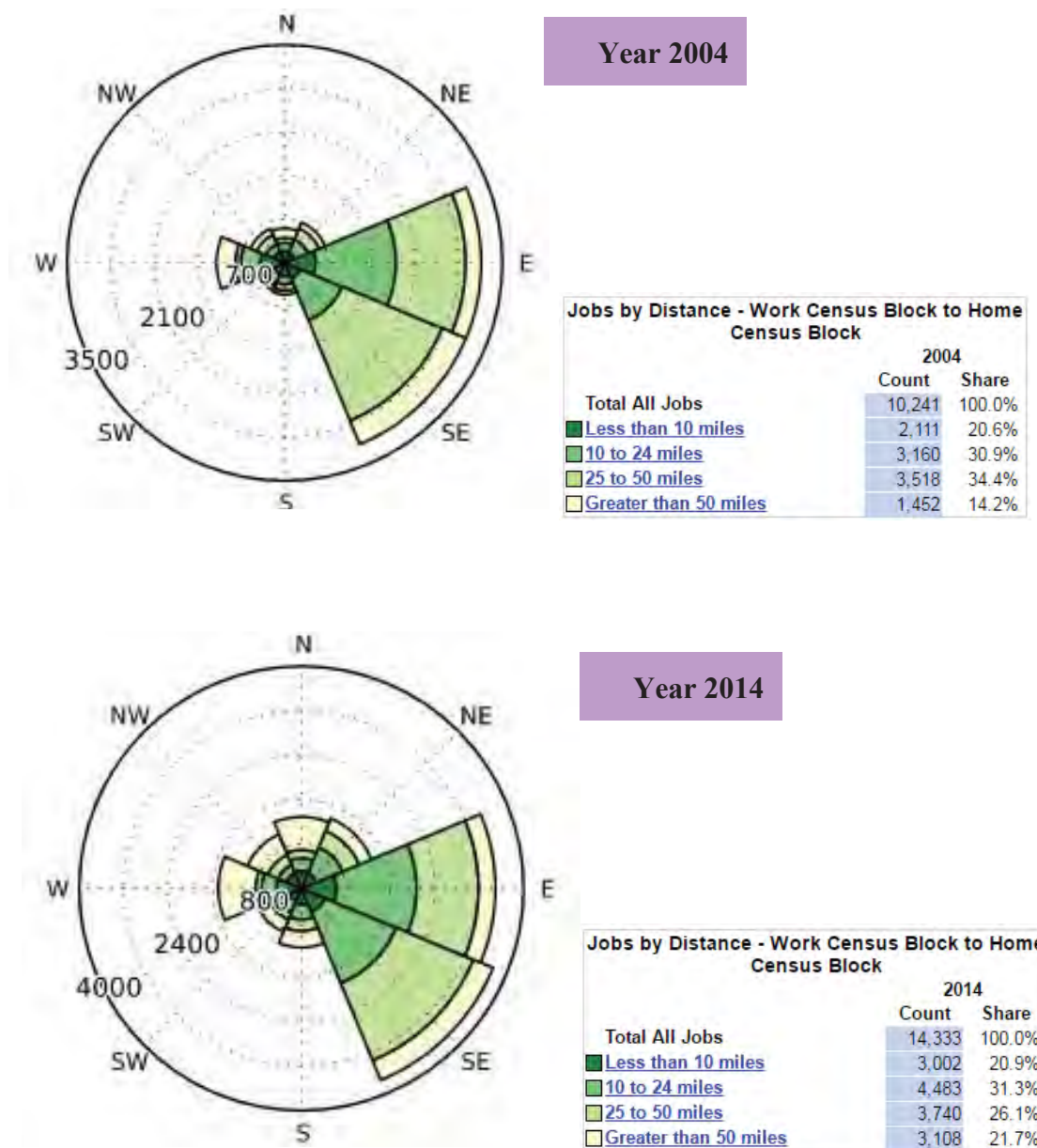


Figure 8.4.2: Job Inflow/ Outflow

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics

From 2004 to 2014, Waller experienced a slight reduction in the proportion of workers that live and work in Waller County. Nearby Harris County, anchored by Houston, attracts a majority of the employment leaving the county. Figure 8.4.3 depicts employment flow from Waller County for 2004 and 2014.



Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics

Figure 8.4.3: Distance and Direction from Home Census Block to Work Census Block

8.5. Leakage/ Surplus Factor

A leakage represents an industry sector where the volume of local retail sales generated by local retail businesses do not meet the volume of retail potential of local household spending – essentially, when demand exceeds supply. A leakage presents an opportunity to keep household spending within the county rather than lose it to markets outside of Waller County. A surplus on the other hand represents a situation where supply exceeds local demand, but it is possible that the excess supply is attracting consumption from outside the Waller market area.

From Figure 8.5.1 we can see that vending machine operators, shoe and accessory stores and stationary stores fall under leakages. Vending machines are very common and important, especially at places like bus stops, school canteens, office canteens, community halls, stadiums, gas stations etc. There are very few sectors which are surplus in the County. Also, we understand that the County primarily depends on the neighboring cities like Houston for jobs, entertainment and shopping centers.

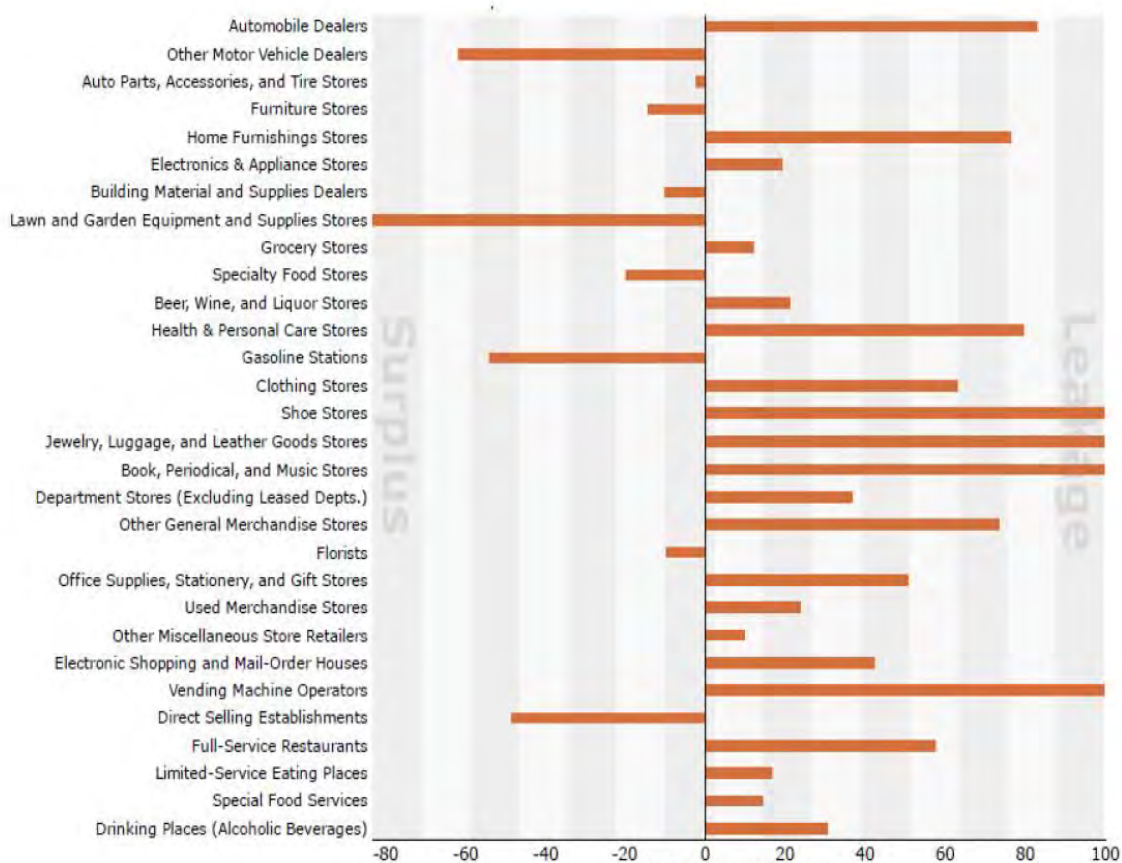


Figure 8.5.1: Leakage/ Surplus Factor by Industry Group

Source: Esri and Infogroup

8.6. Income Distribution

The per capita income of Waller County is \$34,078 (BEA 2014) and median household income is \$50,889.¹⁴ The distribution of median income of the county shows that the Katy area has the highest median income and the Pattison area has the lowest (Figure 8.6.2). In Waller County 29.07% of the African-American population lives below poverty line, followed by 22.76% of the Hispanic population and 21.22% of the White or Anglo population.¹⁵

On an average, White citizens earn more than other races or ethnicities. Figure 8.6.1 shows the wage disparity between the 5 most common occupations.¹⁶

Highest Average Salary: White; \$43,572 ± \$3,317

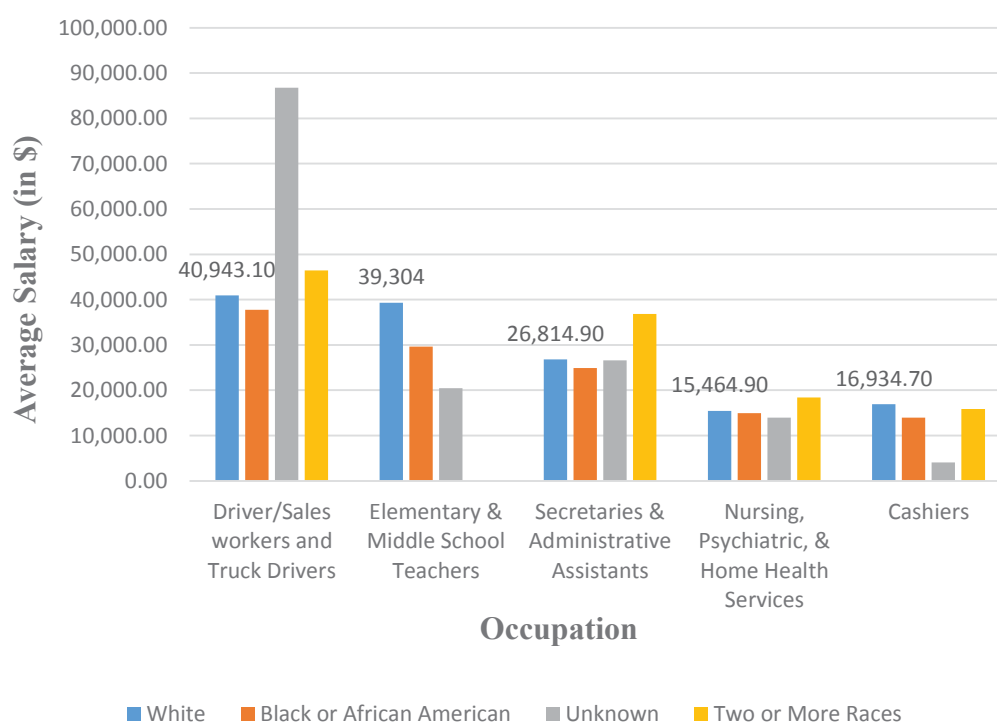


Figure 8.6.1: Wage by Race & Ethnicity

¹⁴ U.S. Census Bureau 2014

¹⁵ U.S. Census Bureau 2014

¹⁶ Dataset: 2014 ACS PUMS 5- year Estimates; Source: U.S. Census Bureau 2014

Median Income Distribution in Waller County

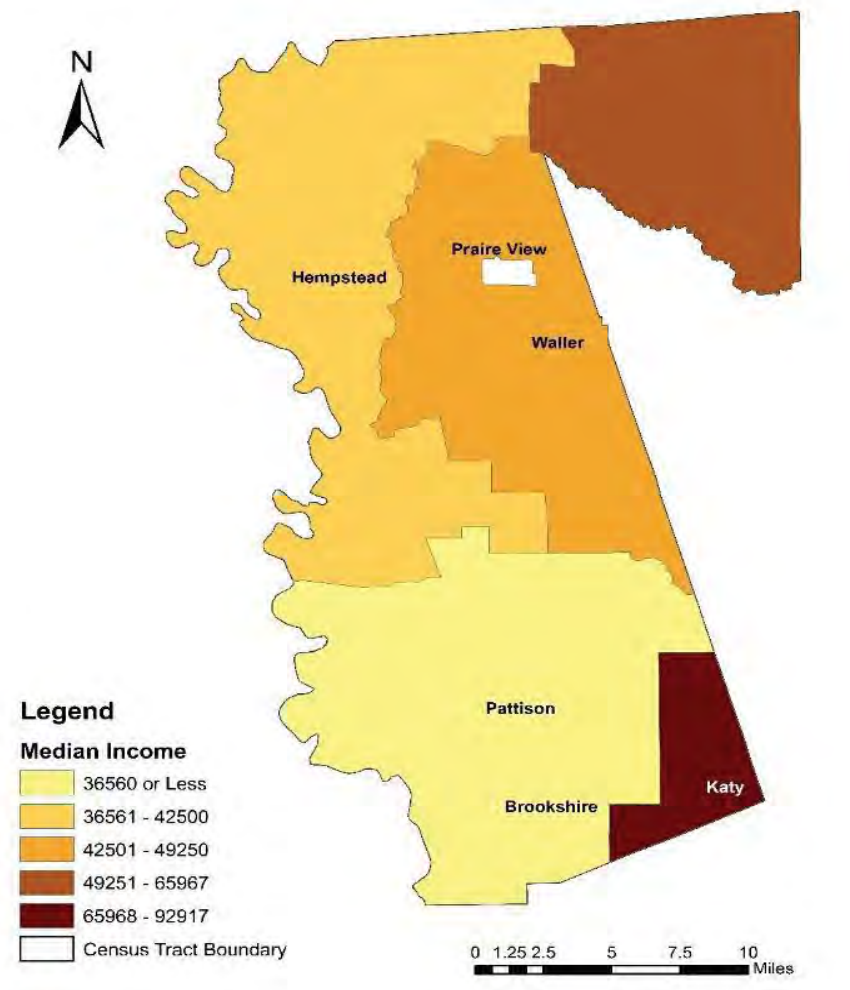


Figure 8.6.2: Distribution of Median Income

Source: U.S. Census Bureau 2014

8.7. Poverty

Roughly 19% of the population in the US live below the poverty level, which is a little more than Texas (17%).¹⁷ In Waller County, Prairie View has the highest percentage of people living below poverty. This may be due to the high student population (Figure 8.7.1). According to the US Census Bureau (see Figure 8.7.2), 36% of the population are in poverty and not in the labor force.

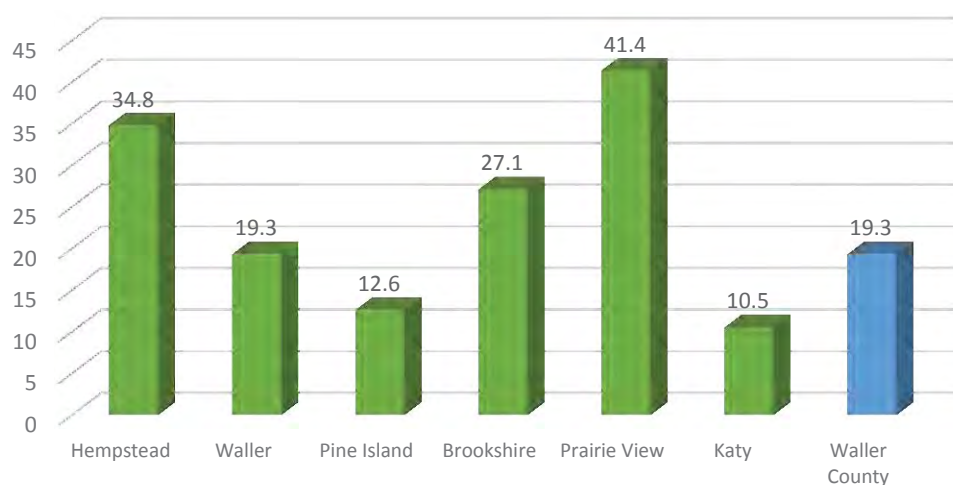


Figure 8.7.1: Population in Poverty (%)

Source: U.S. Census Bureau 2014

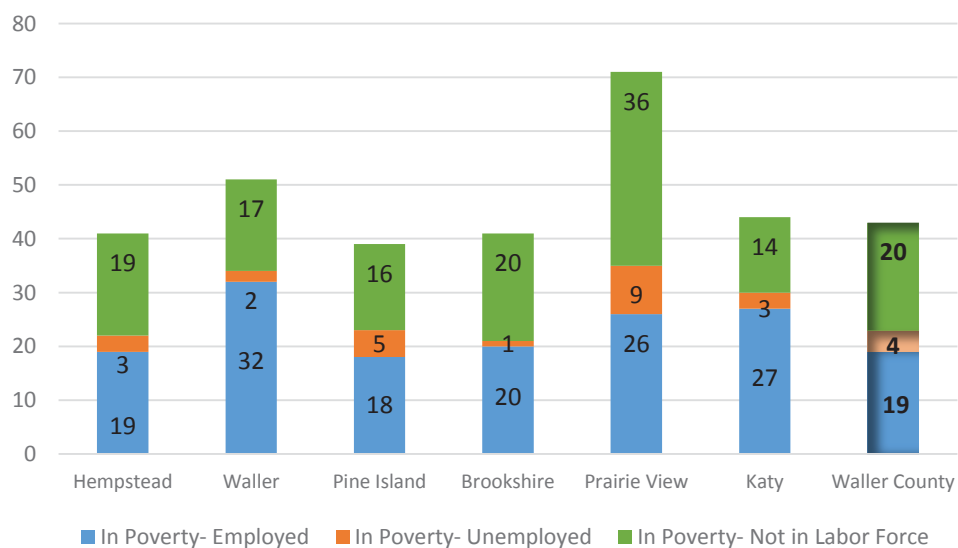


Figure 8.7.2: Population in Poverty and Working Status (%)

Source: U.S. Census Bureau 2014

¹⁷ U.S. Census Bureau 2014

9. Housing

9.1. Housing Types

The majority of the homes in Waller County are single family, multi-family, and mobile homes. There are 15,839 total housing units with an average household size of 2.81 and family size of 3.29.¹⁸ By 2035, 10,000 additional housing units are needed to meet population projections referenced earlier in this document. Roughly, 9,482 are owner occupied units and just over half (51.5%) of the owner occupied units carry mortgage.

Waller County has a larger percentage of mobile homes than Texas. The County has 24% of housing stock as mobile homes which is common in rural areas (Figure 9.1.1).

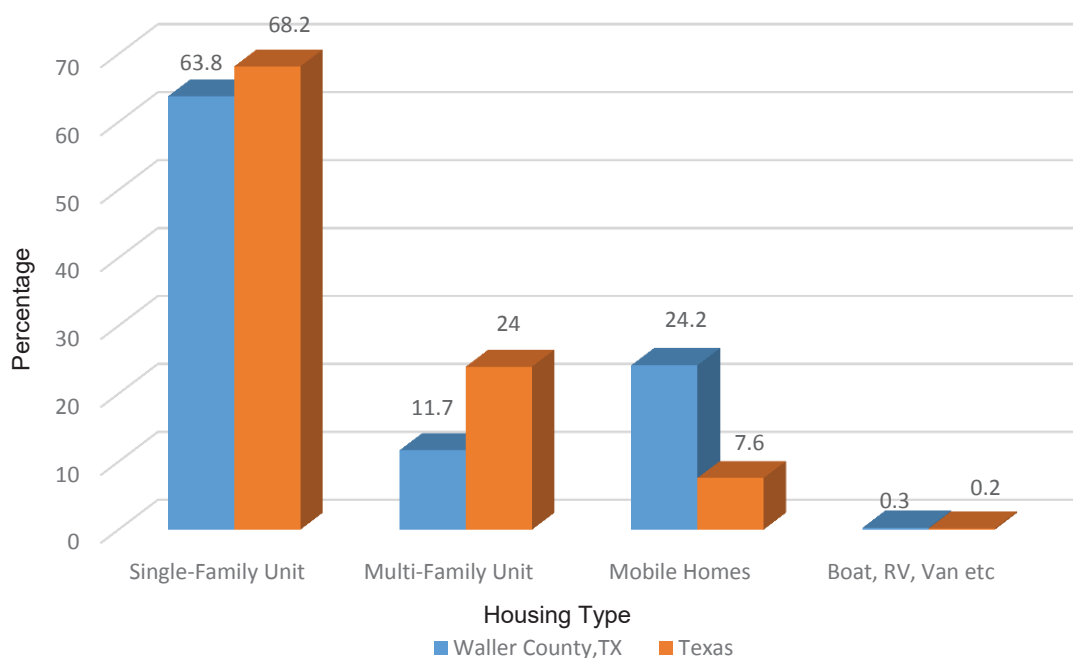


Figure 9.1.1: Comparison of Housing Type (%)

Source: Our Great Region 2040: H-GAC

¹⁸ American FactFinder; U.S. Census Bureau 2014

9.2. Renters Vs. Owners

Texas has 35% rental and 65% owned homes. Overall, Waller County is similar to Texas, though city by city we see a different picture (Figure 9.2.1). A higher percentage of rental homes in Prairie View is likely due to the presence of Prairie View A&M. Pine Island and Katy have the high share of owned homes in the county (Figure 9.2.1). The overall number of rental units are in Table 9.2.2.

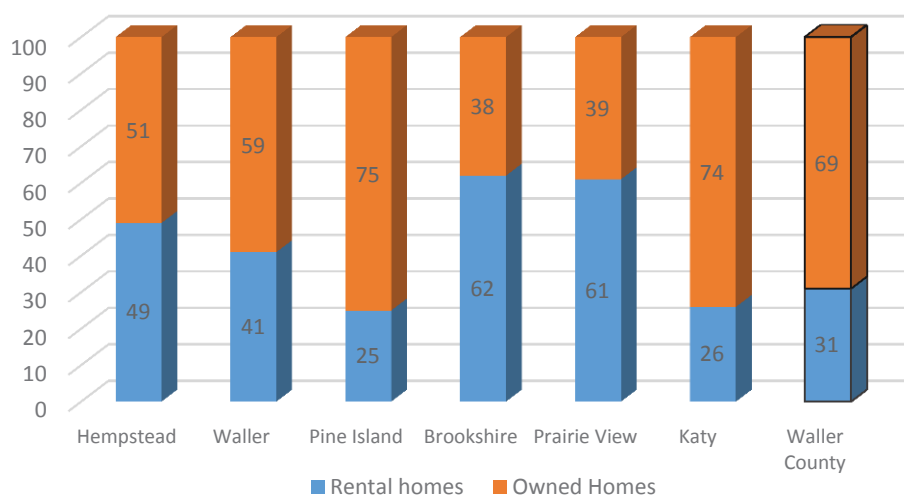


Figure 9.2.1: Percentage of Owned and Rental Homes

Source: U.S. Census Bureau 2014

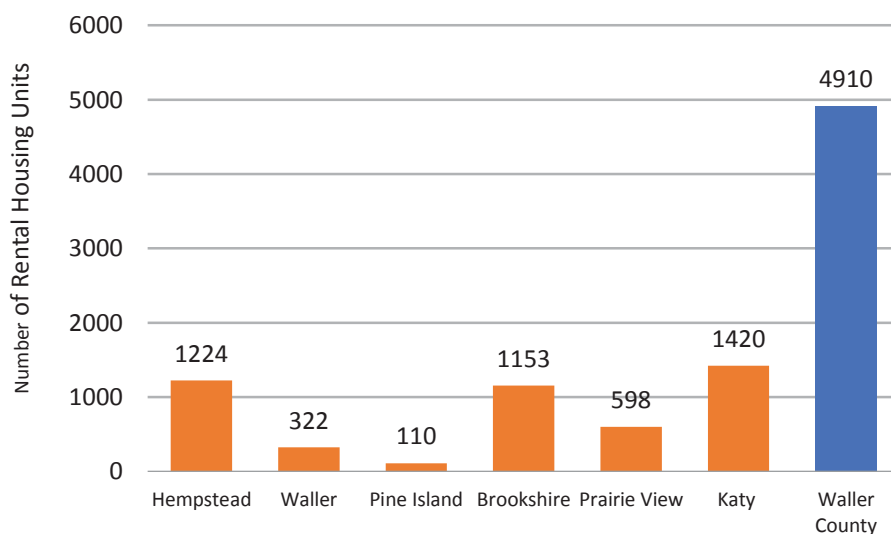


Figure 9.2.2: Number of Rental Housing Units

Source: U.S. Census Bureau 2014

9.3. Home Value

About 18% of the homes in Waller County are worth less than \$50,000 (Figure 9.3.1). It also has one of the largest proportions of home values between \$50,000 and \$100,000 or 21% of all homes (Harris County - 25%, Grimes County - 27%). Roughly 40% of all homes are less than \$100,000 in value and 70% of all homes are less than \$200,000 in value. Figure 9.3.2 offers a closer at the individual cities, Brookshire and Hempstead have a large proportion of homes valued less than \$50,000, 45% and 40% respectively.

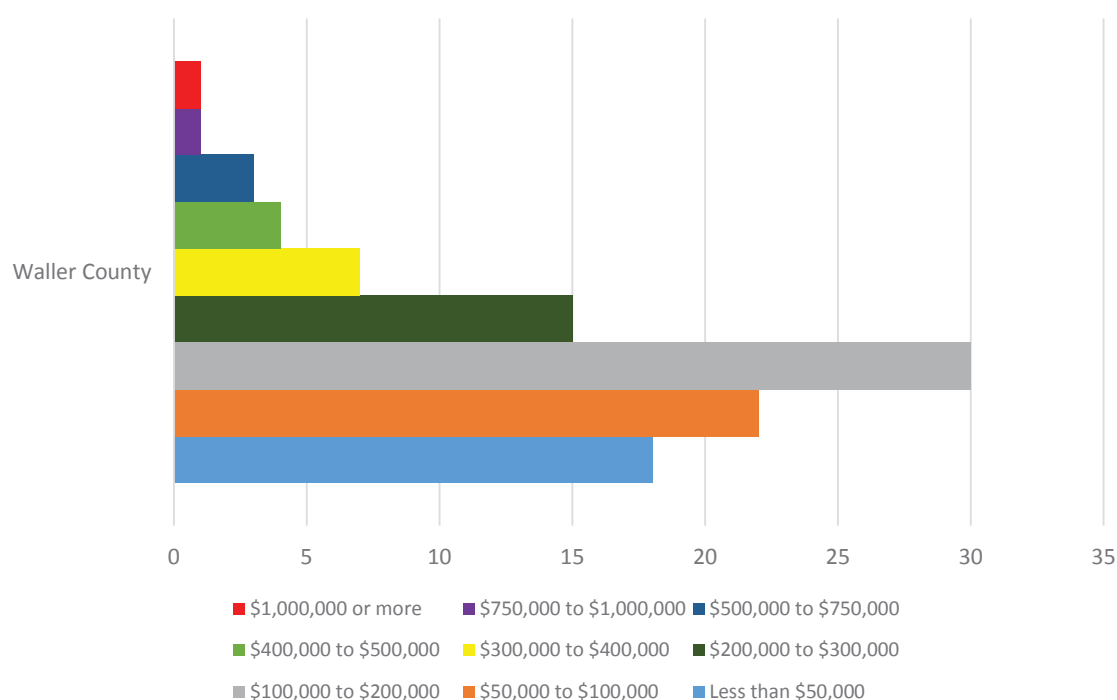


Figure 9.3.1: Home Value Distribution (%)

Source: U.S. Census Bureau 2014

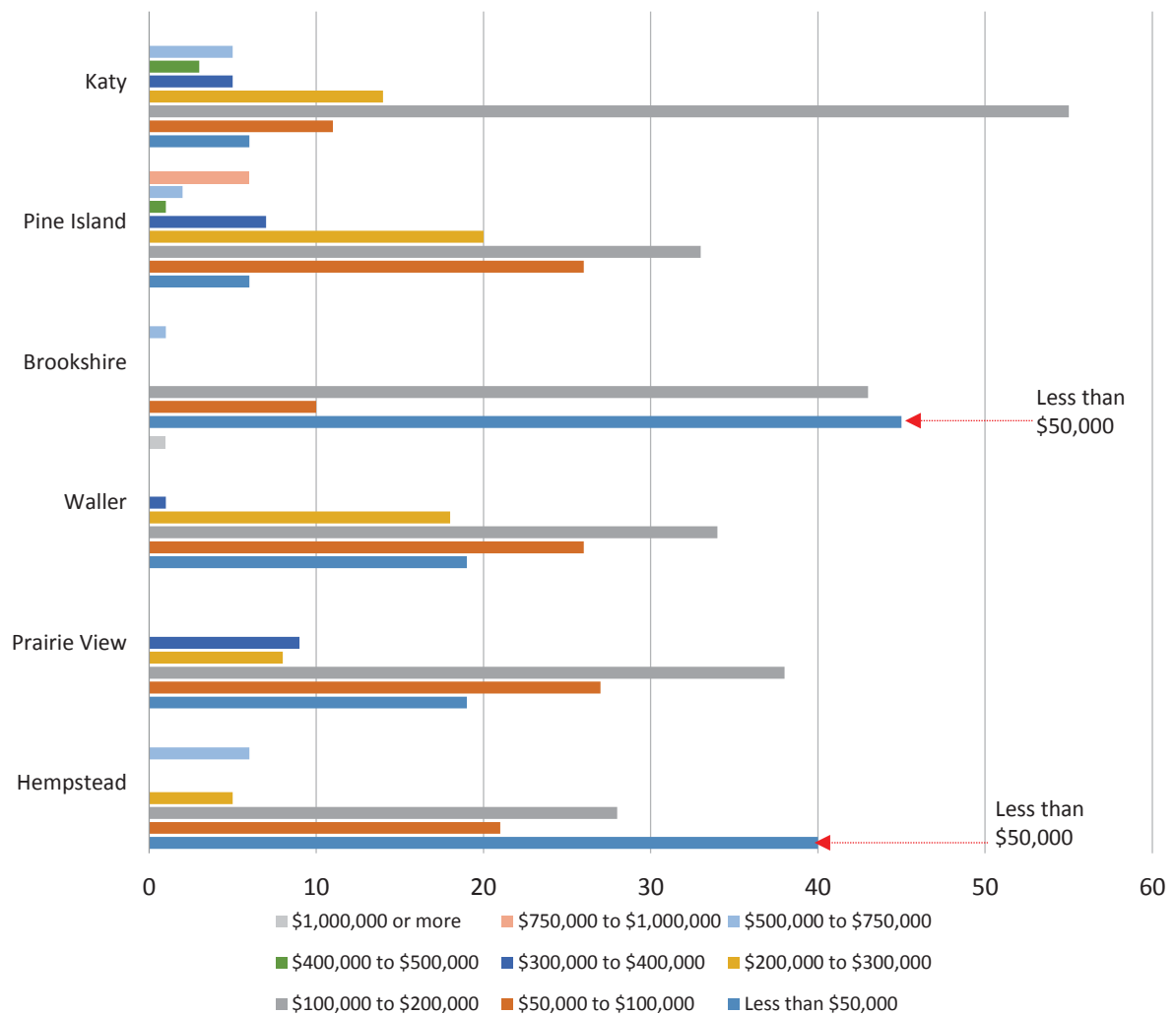


Figure 9.3.2: Home Value Distribution (%) by City

Source: U.S. Census Bureau 2014

9.4. Monthly Rental Rates

With regard to rental rates, most (33%) pay between \$500 and \$750 in Waller County (see Figure 9.4.2). Prairie View has a good mix rent levels, and inn Hempstead, most rental housing is less than \$1000 in rent.

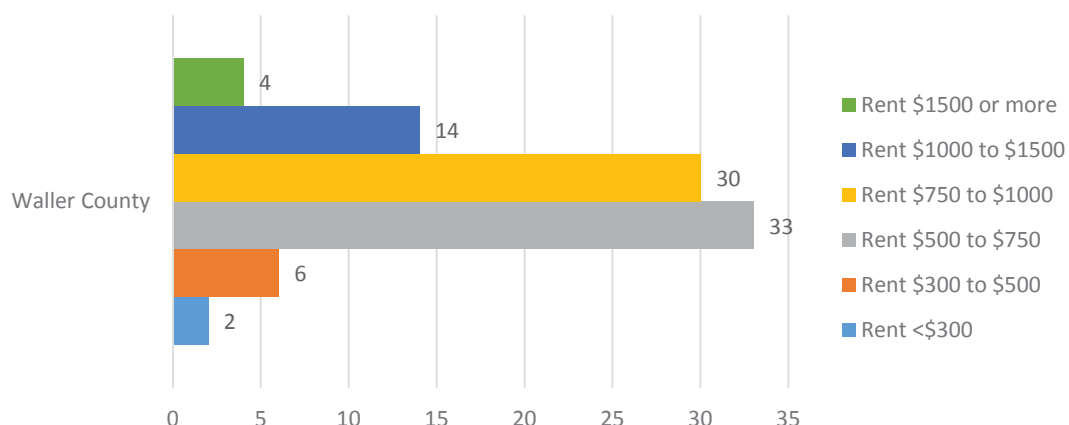


Figure 9.4.1: Monthly Rental rates for the County (%)

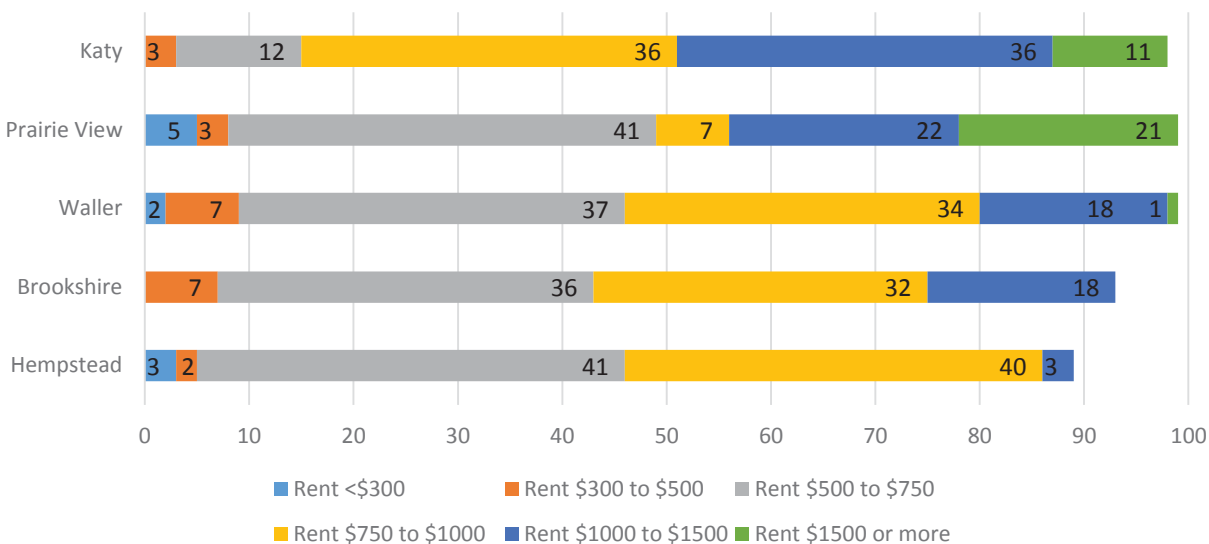


Figure 9.4.2: Monthly Rental Rates Cities(%)

Source: <http://www.towncharts.com/Texas/Housing/Waller-County-TX-Housing-data.html>, U.S. Census Bureau

10. House Vacancy and Unaffordability

10.1. Vacant Housing

Vacant and abandoned properties are often attributed to larger economic forces at work in the community; and they often associated or at least perceived to be associated with higher levels of crime, increased risk to health and welfare, plunging property values, and escalating municipal costs, which exacerbates overall community decline and disinvestment.¹⁹

Out of the total housing units (15,839), roughly 11.5% are vacant. Of vacant units, 2.77% are for rent and 1.29% are for sale (Figure 10.1.2).

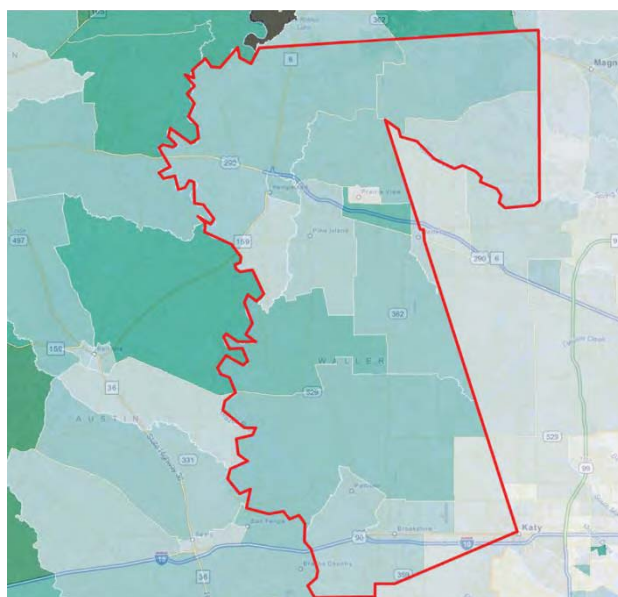


Figure 10.1. 1: Vacant Housing Units (%)

Source: http://www.city-data.com/county/Waller_County-

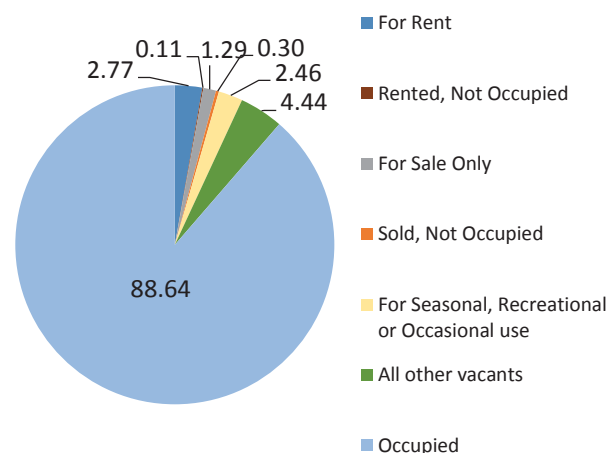


Figure 10.1.2: Housing Availability (%)

Source: ASC, 2014

¹⁹ John Accordini and Gary T. Johnson. 2000. "Addressing the Vacant and Abandoned Property Problem," *Journal of Urban Affairs* 22:3, 302–3.

10.2. Mortgage Status and Affordability

Roughly 51% of housing units in Waller County have a mortgage payment (Texas: 61%).²⁰ As Figure 10.2.1 indicates, Pine Island has comparatively fewer housing units with a mortgage payment (at 30% of houses). In addition, there are 60 units in Hempstead (13.2%) and 9 (11.1%) units in Pine Island that pay more than \$3,000 or more as a mortgage payment. Most of the units in Hempstead and the City of Waller pay a mortgage of over \$1,000.

Housing units without a mortgage payment typically pay a minimum amount for maintenance purposes even after the mortgage has been paid off and are ‘free and clear’. The cities of Hempstead, Waller, Pine Island and Prairie View have more than 50% of homes without a mortgage payment (Table 10.2 2.2). There are 822 units in the County (59 in the City of Waller, 31 in Pine Island, and the remaining in unincorporated areas of the county), paying \$700 or more even without a mortgage. These data can be used in the development of housing programs aimed to meet the needs of people at different economic levels.

²⁰ American FactFinder; U.S. Census Bureau 2014; housing units with mortgage include the loan amount plus the money for maintenance

	Texas	Waller County	Brookshire	Hempstead	Pine Island	Prairie View	Waller city	Katy
Total (Owner Occupied Units)	5,652,542	9,482	601	1,014	273	291	405	3,915
Housing units with a mortgage:	3,423,338	4,882	406	452	81	139	166	2,530
Less than \$200	1,212	0	0	0	0	0	0	0
\$200 to \$299	3,843	6	0	0	0	0	0	6
\$300 to \$399	10,835	0	0	0	0	0	0	0
\$400 to \$499	29,536	33	0	0	0	0	0	0
\$500 to \$599	57,921	69	23	25	0	20	0	0
\$600 to \$699	95,797	140	42	0	0	0	0	16
\$700 to \$799	133,467	192	18	57	0	13	13	0
\$800 to \$899	171,467	222	0	41	0	0	0	49
\$900 to \$999	198,129	155	31	0	1	0	0	122
\$1,000 to \$1,249	578,005	937	171	129	30	30	65	393
\$1,250 to \$1,499	558,475	844	24	120	12	31	68	550
\$1,500 to \$1,999	771,459	1,147	55	20	11	45	15	709
\$2,000 to \$2,499	373,440	503	42	0	8	0	5	348
\$2,500 to \$2,999	189,801	357	0	0	10	0	0	82
\$3,000 or more	249,951	277	0	60	9	0	0	255

Table 10.2.1: Selected Monthly Home Owner Cost - Housing Units with Mortgage

Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates

	Texas	Waller County	Brookshire	Hempstead	Pine Island	Prairie View	Waller city	Katy
Total (Owner Occupied Units)	5,652,542	9,482	601	1,014	273	291	405	3,915
Housing units without a mortgage:	2,229,204	4,600	195	562	192	152	239	1,385
Less than \$100	23,734	13	0	0	0	0	0	0
\$100 to \$149	51,478	9	0	0	2	0	0	8
\$150 to \$199	102,411	141	0	15	0	0	0	8
\$200 to \$249	149,251	263	0	49	3	0	32	68
\$250 to \$299	180,968	424	0	70	20	18	9	43
\$300 to \$349	197,016	479	0	125	6	9	32	25
\$350 to \$399	199,842	484	62	99	14	0	17	38
\$400 to \$499	360,308	756	104	57	43	55	62	188
\$500 to \$599	285,788	675	8	116	43	27	23	196
\$600 to \$699	206,468	534	21	31	30	24	5	212
\$700 or more	471,940	822	0	0	31	19	59	599

Table 10.2.2: Selected Monthly Home Owner Cost - Housing Units without Mortgage

Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates

10.3. Monthly Rental Rates²¹

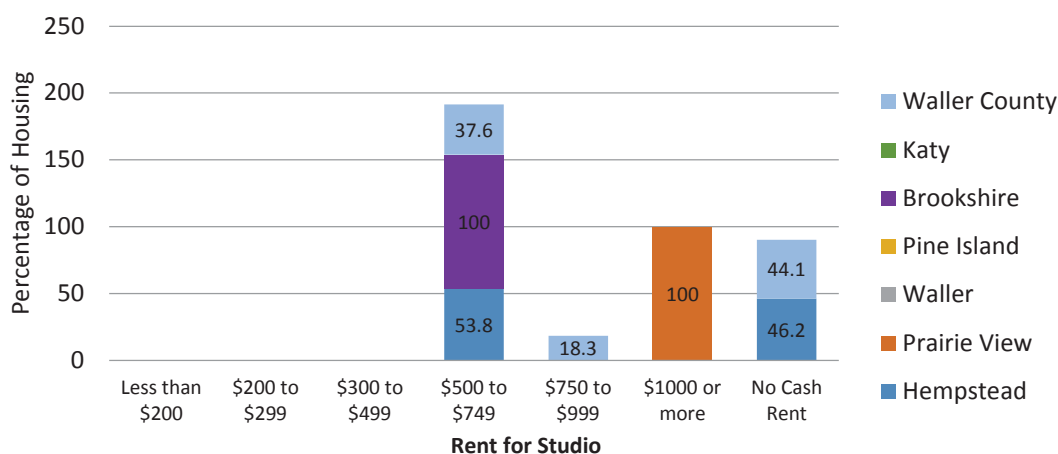


Figure 10.3. 1: Rental Characteristics for Studio - No Bedroom Units

There are 44% of studio apartments available for rent in the County, although none are available in the City of Waller, Pine Island and Katy. In Prairie View all the studio apartments are \$1000 or more. Additionally, 45% of apartments in Hempstead and Waller County overall are on 'rent without any cash'.²²

As for one-bedroom rental units, most range from \$500-\$749 per month but Katy has majority of units costing more than \$750 per month.

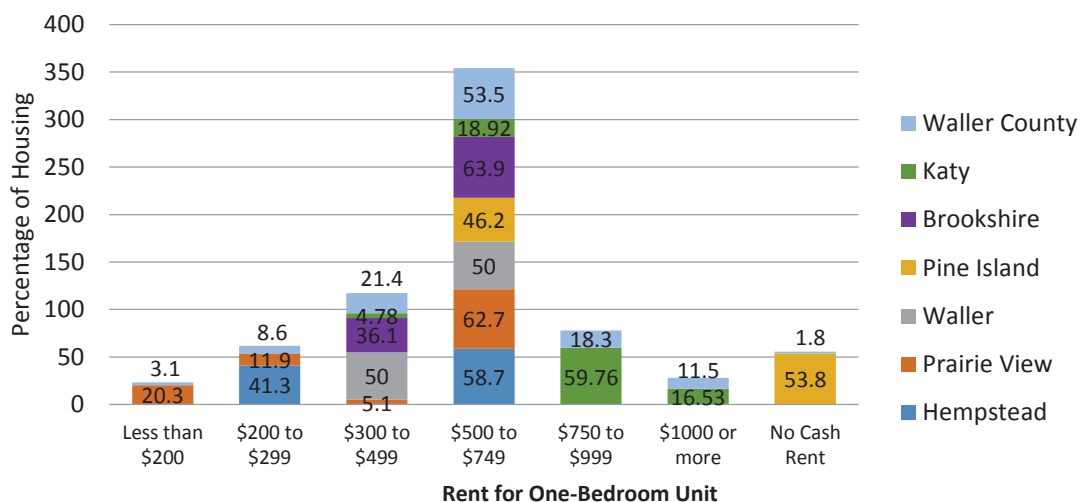


Figure 10.3.2: Rental Characteristics for One-Bedroom Units

²¹ U.S. Census Bureau 2014

²² No cash rent are provided free by friends or relatives or in exchange for services such as resident manager, caretaker, minister, or tenant farmer; also military bases.

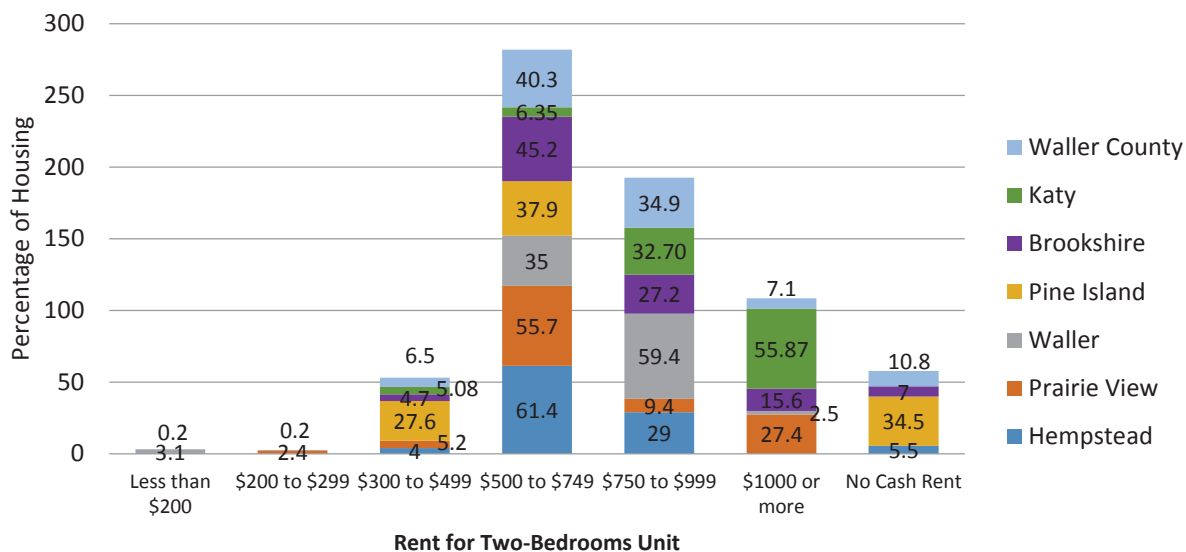


Figure 10.3.3: Rental Characteristics for Two-Bedrooms Units

Two bedroom apartments are available in most of the cities in all price ranges, though the County average ranges from \$500-\$1000 (Figure 10.3.3).

About 82% of rental properties in Prairie View and 70% in Katy are more than \$1,000 per month for a three bedroom unit.

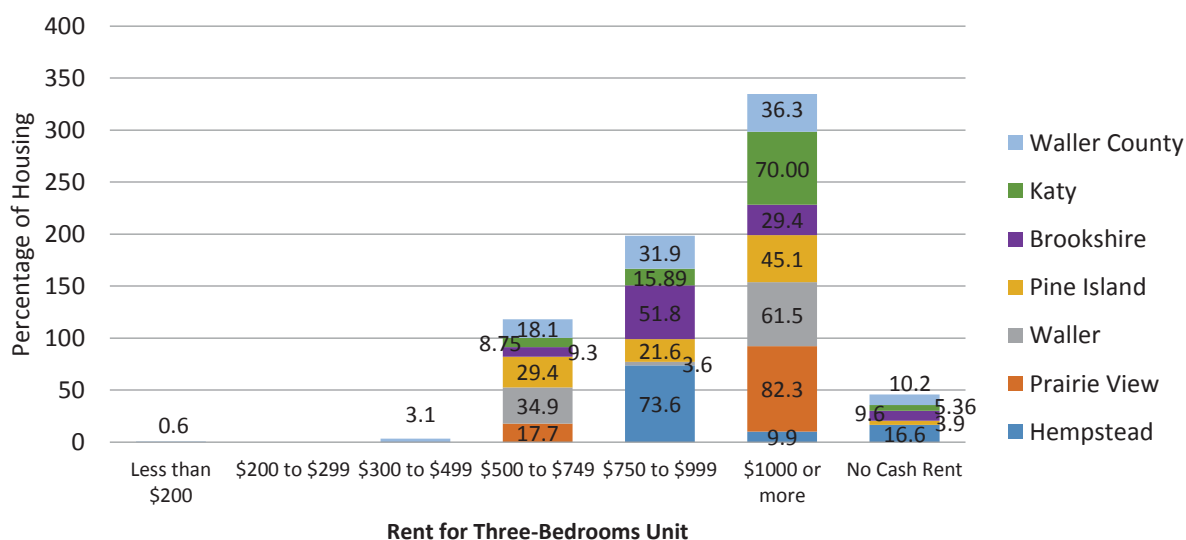


Figure 10.3.4: Rental Characteristics for Three-Bedrooms Units

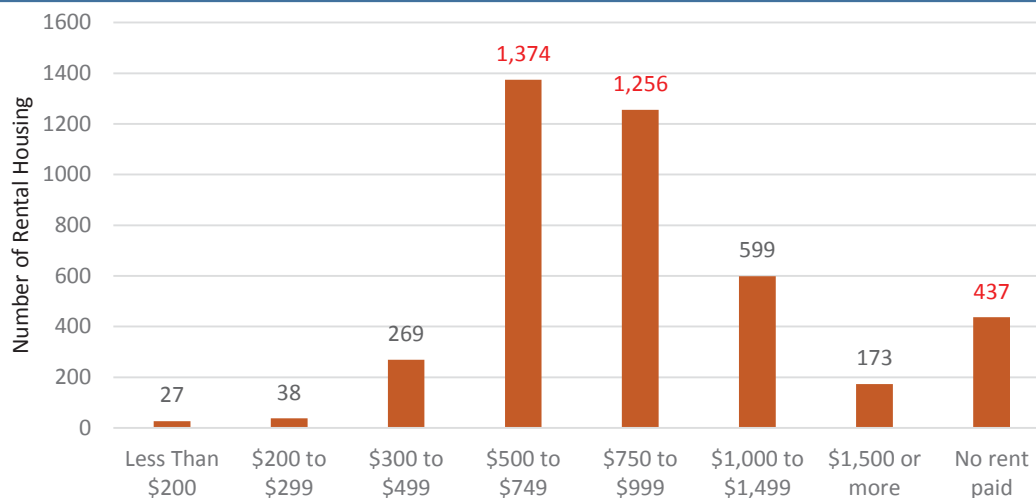


Figure 10.3.5: Number of Rental Housing Units by Price in Waller County

The Figure 10.3.5 above indicates the number of rental housing units at various price ranges in Waller County. Most of the rental units fall within the \$500 – \$900 range. There are around 440 units which take no rent from renters.²³

²³ No cash rent are provided free by friends or relatives or in exchange for services such as resident manager, caretaker, minister, or tenant farmer; also military bases.

10.4. Affordable Housing Programs

Waller County's federally assisted affordable rental housing stock includes 16 properties and 754 units financed through Section 8, LIHTC and RD 515.²⁴ Units provide some form of rental assistance to make them more affordable for very low income population. The largest federally assisted affordable rental community in the county is the Park at Clear Creek (76 units) while the smallest is Donald Sowell (1 unit). Two apartment properties provide senior housing totaling 90 units.

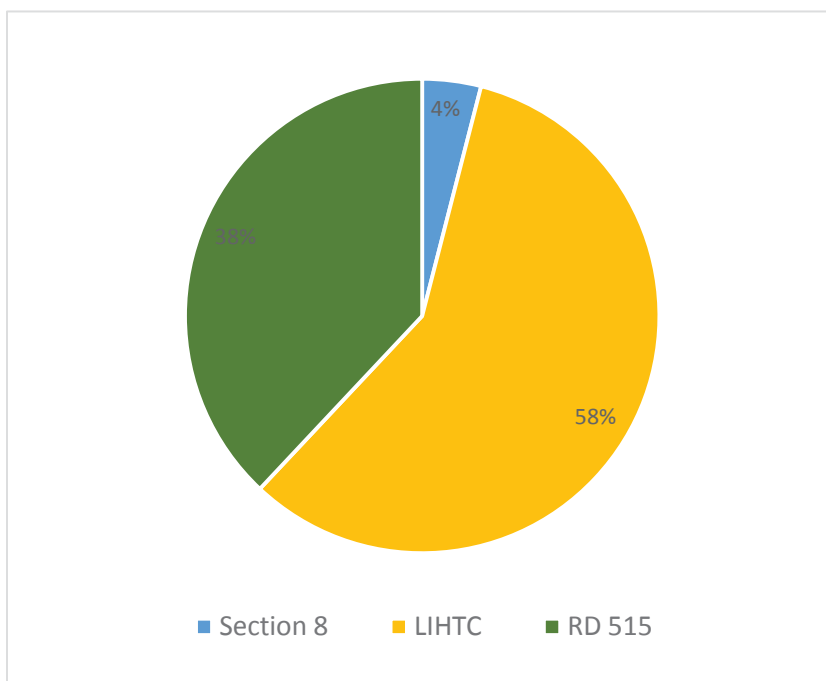


Figure 10.4. 1: % of Federally Assisted Affordable Housing in Waller County

Source: www.affordablehousingonline.com

²⁴ The Low-Income Housing Tax Credit (**LIHTC**) is the federal government's primary program for encouraging the investment of private equity in the development of affordable rental housing for low-income households.

Section 8: The housing choice voucher program is the federal government's major program for assisting very low-income families, the elderly, and the disabled to afford decent, safe, and sanitary housing in the private market. Since housing assistance is provided on behalf of the family or individual, participants are able to find their own housing, including single-family homes, townhouses and apartments.

RD 515: Rural Rental Housing Loans are direct, competitive mortgage loans made to provide affordable multifamily rental housing for very low-, moderate-income families, elderly persons, and persons with disabilities. This is primarily a direct housing mortgage program; its funds may also be used to buy and improve land and to provide necessary facilities such as water and waste disposal systems.

www.affordablehousingonline.com

Cities with Federally Assisted Projects in Waller County

City	Properties	Units
Heampstead	7	399
Prairie View	5	133
Brookshire	2	92

Program	Properties	Units
Section 8	1	44
LIHTC	13	641
RD 515	9	415
Total	16	754

Note: The total does not necessarily equal the sum of each program as some properties may participate in multiple funding programs

11. Environmental Factors

11.1. Most Recent Natural Disasters:²⁵

There have been a number of federally declared disasters since 1995 in Waller County (13), six hurricanes, four fires, three floods, three storms, and two tornadoes (Table 11.1.1). To date, Waller County has been granted about \$6,218,085.26 in FEMA Public Assistance.

Name	Incident Period	Emergency Declared	FEMA Id	Natural Disaster Type
Texas Hurricane Ike	September 7, 2008 – September 26, 2008	September 10, 2008	FEMA-EM-3294	Hurricane
Texas Hurricane Ike	September 7, 2008 – October 2, 2008	September 13, 2008	FEMA-DR-1791	Hurricane
Texas Hurricane Gustav	August 27, 2008 - September 7, 2008	August 29, 2008	FEMA-EM-3290	Hurricane
Texas Wildfires	March 14, 2008 - September 1, 2008,	March 14, 2008	FEMA-EM-3284	Fire
Texas Hurricane Rita	September 23, 2005 - October 14, 2005	September 24, 2005	FEMA-DR-1606	Hurricane
Texas Hurricane Rita	September 20, 2005 to October 14, 2005	September 21, 2005	FEMA-EM-3261	Hurricane
Texas Hurricane Katrina	August 29, 2005 to October 1, 2005	September 2, 2005	FEMA-EM-3216	Hurricane
Texas Extreme Fire Hazards	August 1, 1999 to December 10, 1999	September 1, 1999	FEMA-EM-3142	Fire
Texas Severe Storms, Flooding and Tornadoes	October 17, 1998 to November 15, 1998	October 21, 1998	FEMA-DR-1257	Storm, Tornado, Flood
Texas Fire Emergency	February 23, 1996 to September 19, 1996	February 23, 1996	FEMA-EM-3117	Fire

Table 11.1. 1: History of Natural Disaster

²⁵ http://www.city-data.com/county/Waller_County-TX.html#ixzz4AwE2PeUH ;

11.2. Floods, Historical Tornadoes²⁶, and Watersheds

Most of Waller County has been affected by tornadoes of scale F0- F2 at some point in its history. The eastern side of the County is more prone to flooding due to the presence of the Brazos River.

Watershed planning is a common practice for flood mitigation and ecological sustainability. If we look at the county by watershed, eastern Waller County (in purple) drains towards Houston and western Waller County (in white) drains toward the Brazos River (Figure 11.2.2). Development and increased impervious surfaces in the County will likely impact drainage and flooding in the Houston area. Eastern Waller County development will impact the Addicks Reservoir, while western Waller County development will impact communities along the Brazos River, such as Richmond, Rosenberg, and Sugar Land.

²⁶ (In) 100 Year- Floodplain- 1% probability of occurring in any given year.
(Out) 500 Year- Floodplain- 0.2% probability of occurring in any given year
Fujita Scale
F0- Light Damage
F1- Moderate Damage
F2- Significant Damage
F3- Severe Damage

www.agcensus.usda.gov, www.h-gac.com

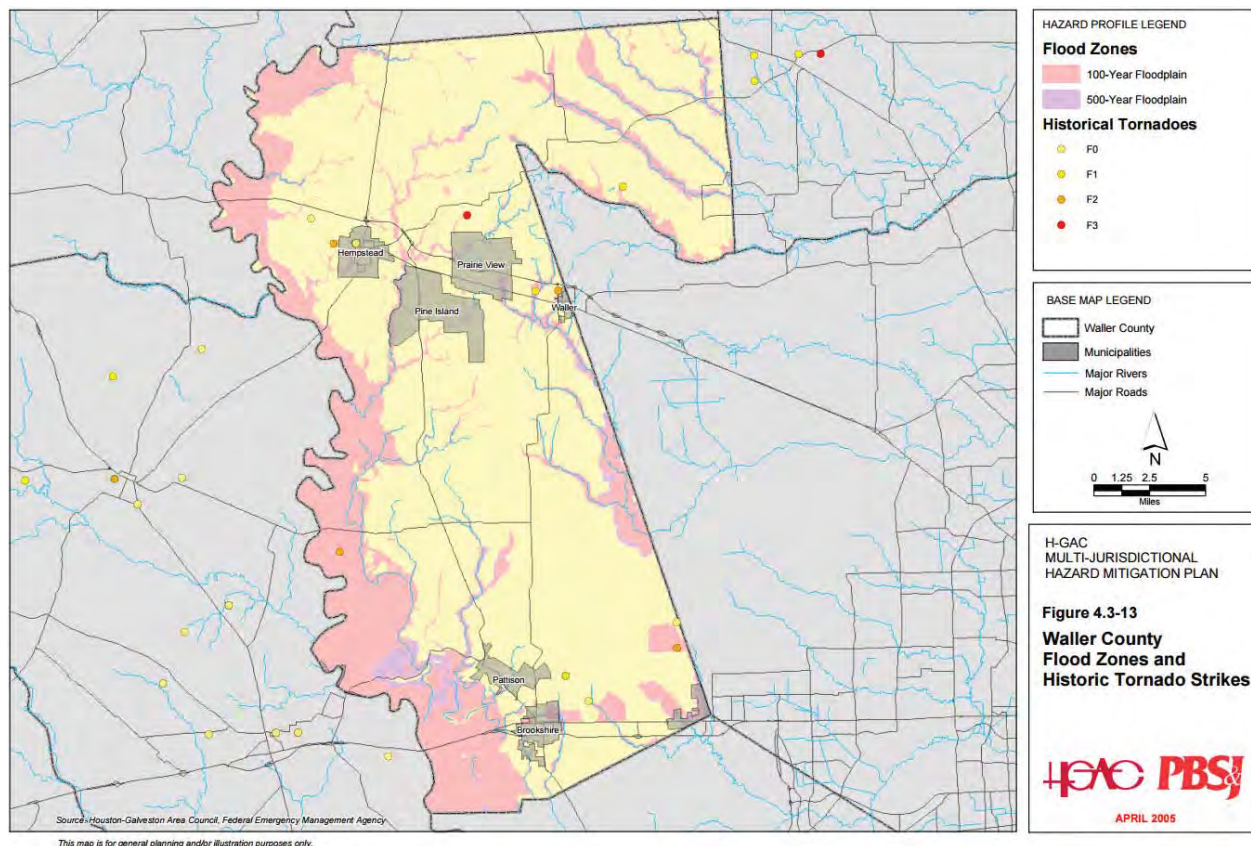


Figure 11.2.1: Flood Zones Map 2006

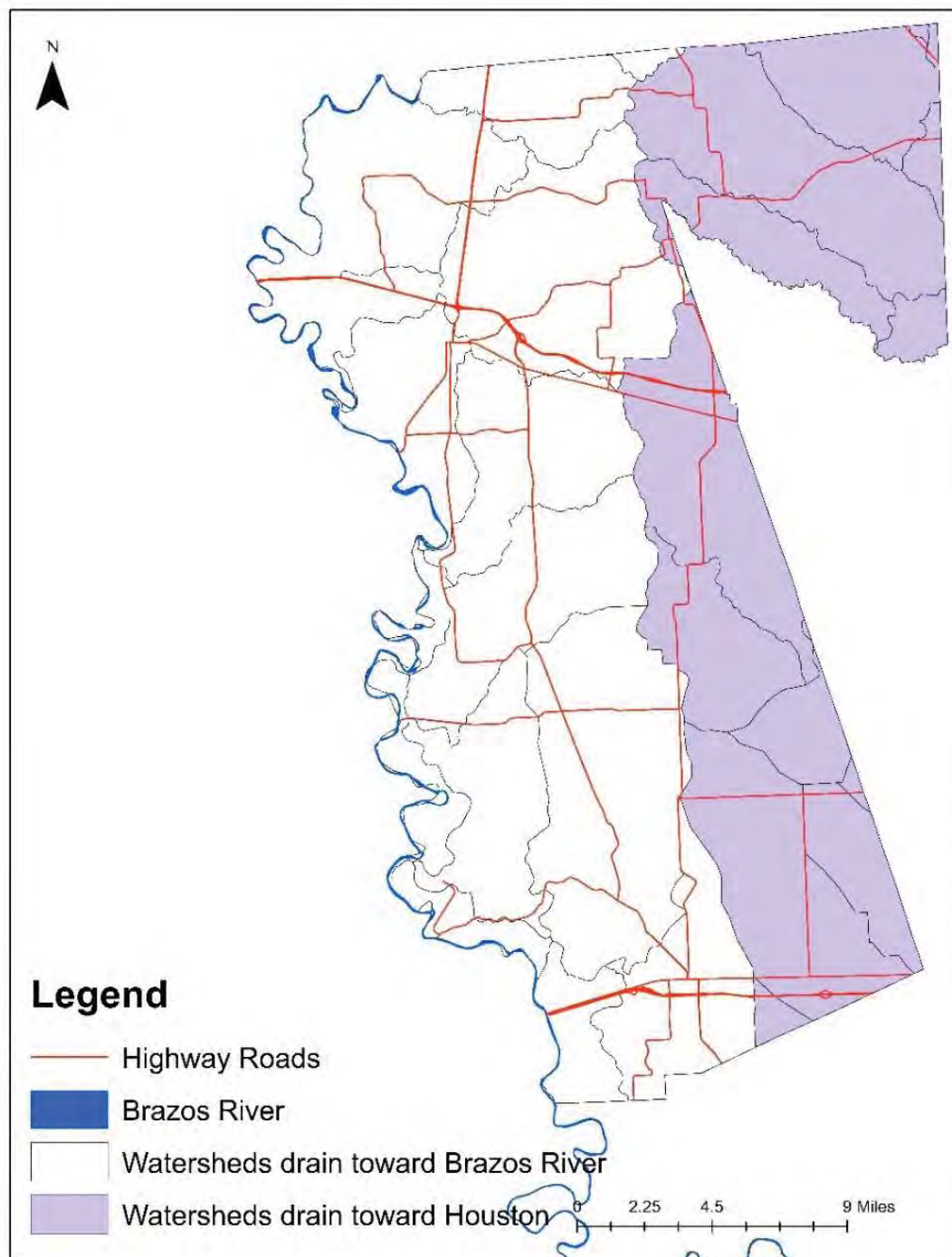


Figure 11.2.2: Watershed Map

11.3. Land Cover

As seen in Figure 11.3.1 the majority of the County is agricultural land, with dense forested areas to the north. As the County grows, development is anticipated along the 290 corridor, in the already established cities of Waller, Prairie View, and Hempstead. Development is also anticipated along the I-10 corridor near Brookshire to Katy area. Thoughtful consideration of the environment, flooding impacts, and soils types will yield a county positioned for a prosperous future.

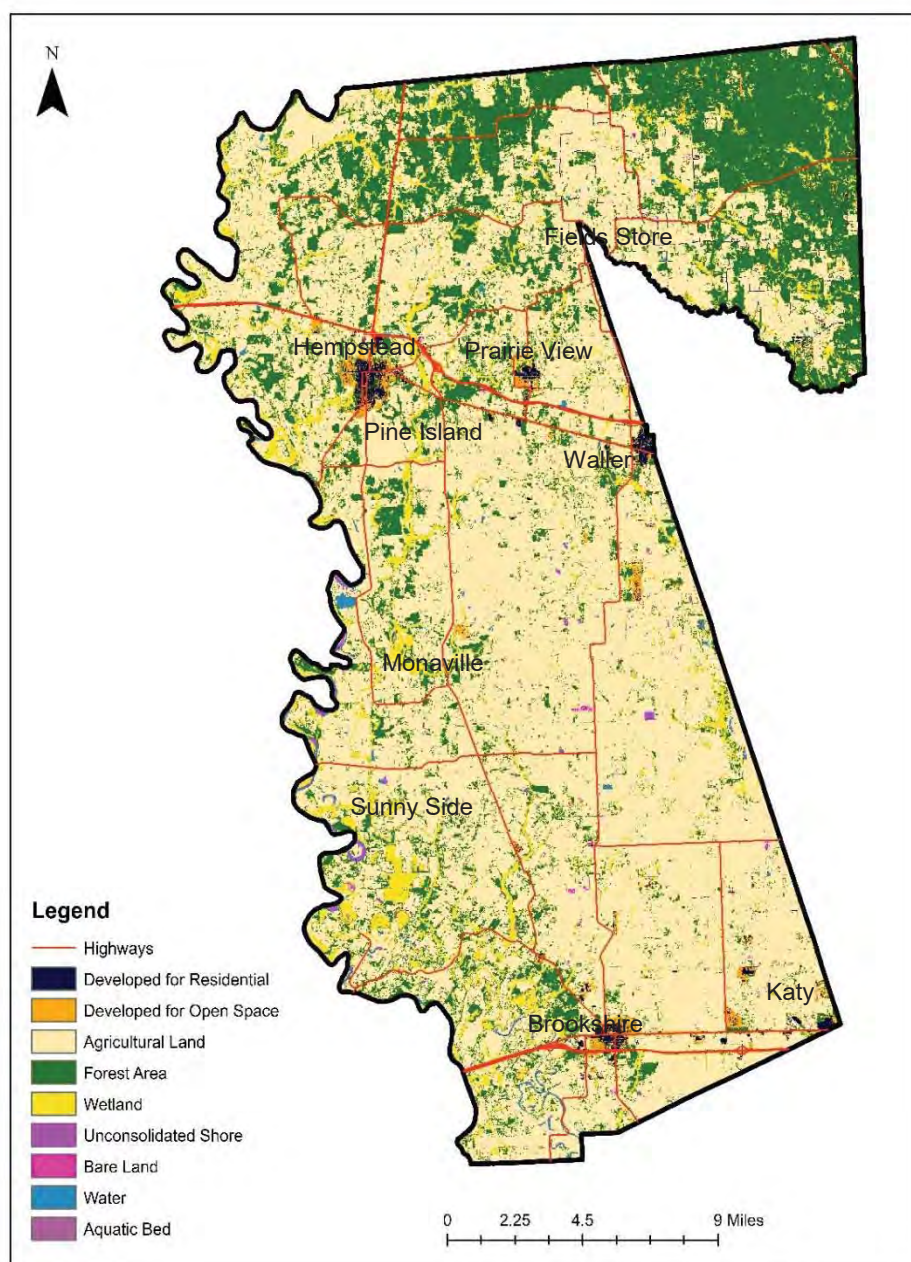


Figure 11.3.1: Land Cover change 1996-2010

11.4. Soil

Looking at the soils in Waller County, there is an abundance of ‘prime farmland’ (Figure 11.4.1). Prime farmland produces the highest yields with minimal inputs of energy and economic resources.

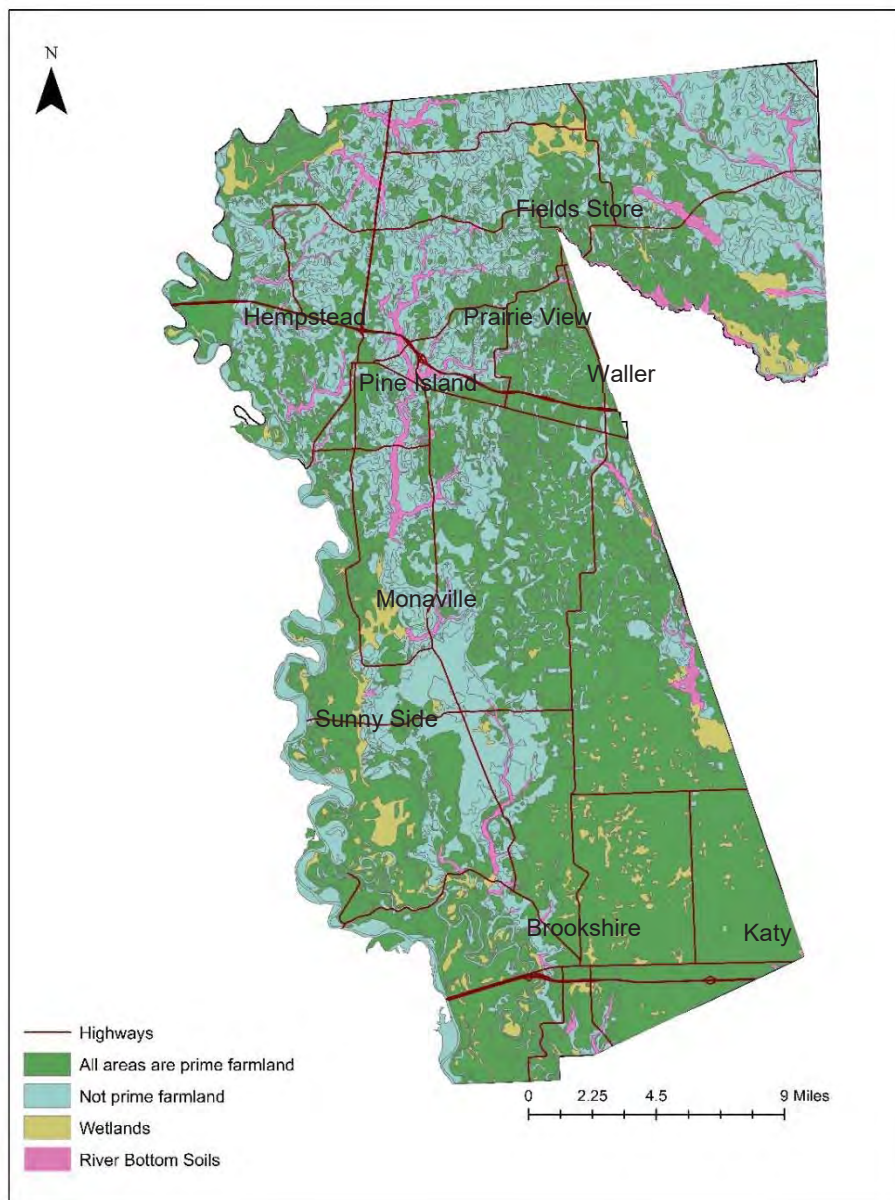


Figure 11.4.1: Land Suitability

12. Infrastructure

12.1. Transportation

Waller County contains two important transportation connections, US highway 290 in the north and Interstate 10 in the south. Both roads are two of the three primary routes into the City of Houston, positioning the County for development opportunities. (Figure 12.1.1).

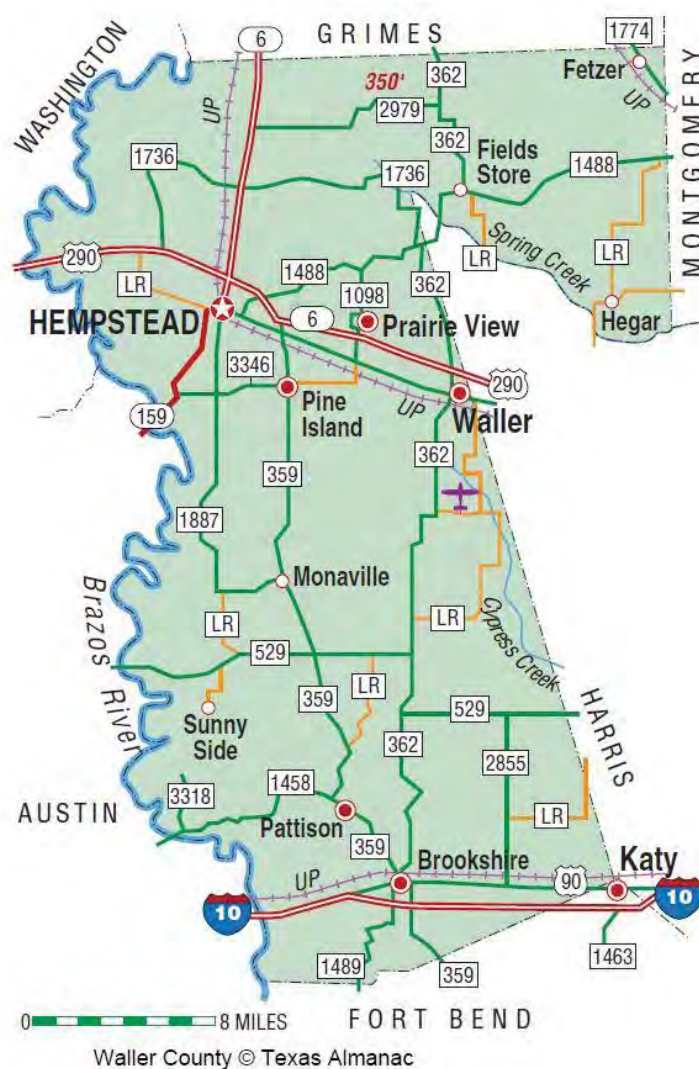


Figure 12.1.1: Road/ Rail Connection

Currently 17% of residents car pool to work and 9% walk, take a bus or work at home (Figure 12.1.2). Because of the high volume routes of Highway 290 and I-10, there are opportunities for alternative transportation options commuting to Houston. According to H-GAC Regional Travel Demand Model calculated in 2008, Weekday Peak Period Ridership is more than 6900 vehicles along Highway 290. Figure 12.1.13 shows possible commuter rail opportunities in the Houston area, one of which is the 290- Eureka rail route. It has the potential commute time of 20 minutes from downtown Houston to Waller County during the peak hour. This option would provide additional access to schools, workplace, and service providers (including medical clinics, daycare and various social service providers).

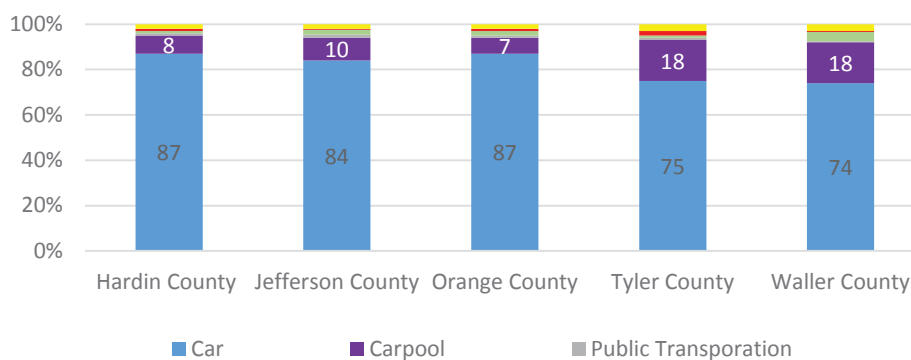


Figure 12.1.2: Transportation Mode Choice to Work- Comparing

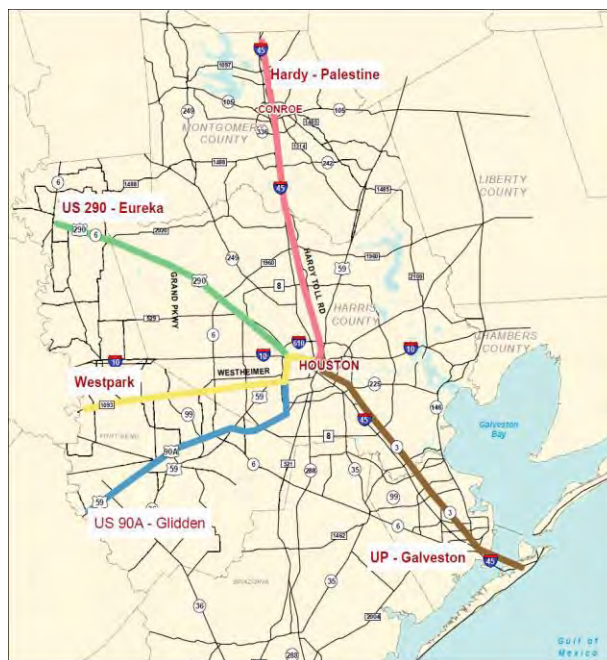


Figure 12.1.3: Proposed Rail route H-GAC

Source: <http://www.txdot.gov/>

12.2. Facilities

Figure 12.2.1 displays the location of police stations, fire stations, schools, healthcare, airports and parks throughout the County. The county has one hospital located in Prairie View but other major hospitals are relatively close:

- Tomball Regional Medical Center
- North Cypress Medical Center
- Methodist West Houston Hospital, Cypress Fairbanks Medical Center
- Memorial Hermann Katy Hospital, Christus St Catherine Hospital

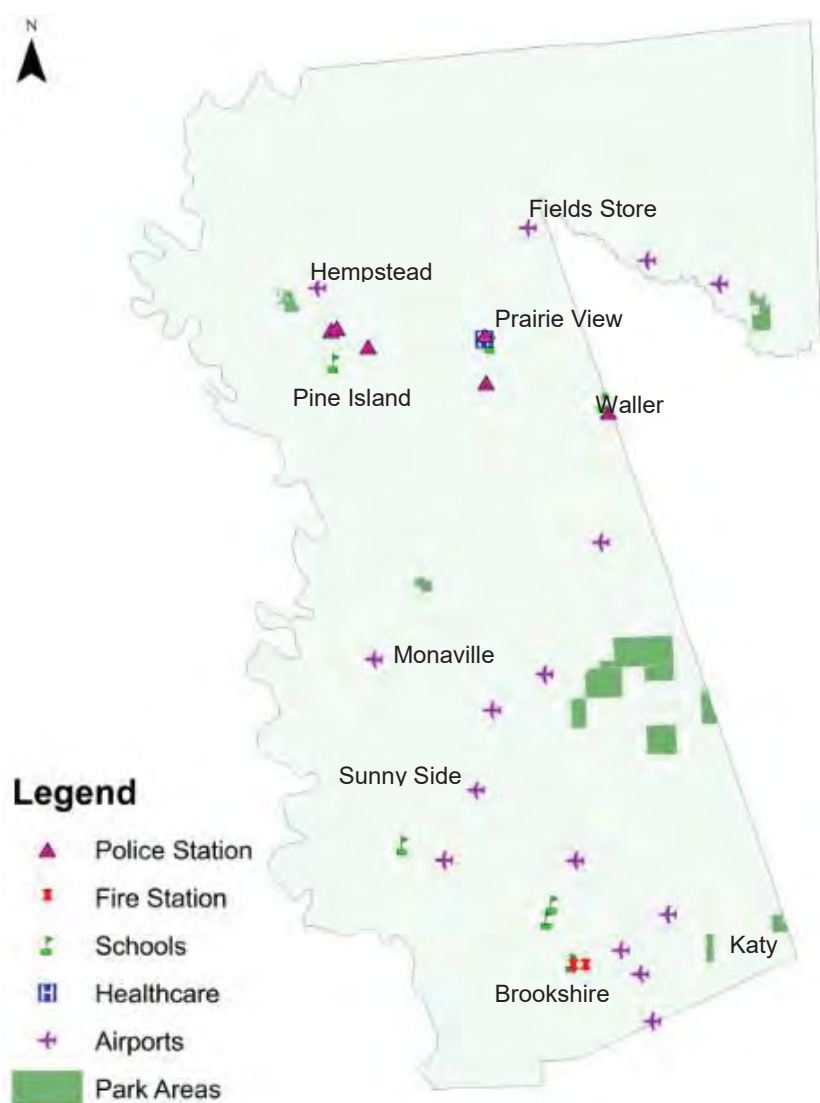


Figure 12.2.1: Facilities Map

12.3. County Independent School Districts:

Waller I.S.D.

The Waller Independent School District, serves the communities of Hockley, Prairie View and Waller. In April 1989, the district was revisited by an accreditation team from the Texas Education Agency and maintained full accreditation as a result of the visit. It has one elementary school, three middle schools, and two high schools.

Hempstead I.S.D.

The Hempstead School District has one elementary school, one middle school, and one high school and with the passage of a bond issue in 1996, the district has undertaken an aggressive building and renovation program. A new middle school was completed in the summer of 1997 and extensive renovations to the high school and elementary school were completed the following year. A new track facility was also completed in 1998 and current planning is underway for a new athletic stadium.

Royal I.S.D.

The Royal Independent School District is located in southern Waller County and serves the communities of Brookshire, Pattison, Sunnyside and surrounding areas. In 2009, the school district was rated “academically acceptable” by the Texas Education Agency. It has two elementary schools, two middle schools and two high schools.

Katy I.S.D.

The Katy Independent School District is located in southeast corner of the Waller County in the city of Katy. A small portion of the Katy ISD serves the county. The school district has been recognized by the Texas Education Agency.

13. S.W.O.T Analysis

Strength

- Proximity to Houston
- Important transportation routes to Houston, by way of Highway 290 and I-10
- Abundant rich soils considered ‘prime farmland’
- Prairie View A&M University brings opportunity for higher education and research endeavors
- Low cost of living
- Rural and country lifestyle
- Strong industries in Mining, Construction, Manufacturing and Wholesale Trade
- Low unemployment
- High population projections through 2050
- Growth and development in the City of Katy, expanding westward annexing parts of the county.

Opportunities

- Facilitate anticipated future development growth along Highway 290 and I-10, residential and economic development
- Expand alternative transportation options and commuter rail to Houston
- Develop in a resilient way to reduce flood impacts for County residents and those in surrounding areas
- Diversify housing options, including housing values above \$200,000
- Preserve ecologically rich areas, including north Waller County and market for eco-tourism
- Capture weekend urbanites promote eco-tourism and the ‘rural playground’ of Waller County (i.e., cyclists, agri-tourism, etc.)
- Expand relationship with Prairie View A&M University and the Texas A&M University System as it is prime location between Houston area executives and Texas A&M University.
- Shore up leakages in household purchases

APPENDIX II:
PURDUE UNIVERSITY REGIONAL DATA SNAPSHOT
INDUSTRY CLUSTER ANALYSIS 2016



Regional Data Snapshot

Industry Cluster Analysis
SET Session 1

Waller County Region, Texas



Table of Contents

01

Overview

03

Industry Cluster Analysis

02

Industry and Occupation

04

Occupations

01 overview

Waller County Region, TX

Overview

Waller County Region, TX

The Waller County Region is comprised of 8 Texas counties. The region includes large metropolitan area of Houston. Interstate 10 connects the region to San Antonio in the west and Louisiana in the east, and Interstate 45 connects the region to Dallas, TX in the north.

- Austin
- Brazos
- Fort Bend
- Grimes
- Harris
- Montgomery
- Waller
- Washington



02 industry and occupation

Establishments

Employment by industry

Industry and occupation

Components of changes in Jobs

Changes in Jobs (2009-2015)

Gained by	New Startups	+1,032,677
	Spinoffs	+376,363
	Expansion	+724,982
	In-migration	+66,870
Lost by	Closings	-1,253,731
	Contractions	-481,347
	Out-migration	-46,186
	Net change	+419,628

An establishment is a physical business location.

Branches, standalones and headquarters are all considered types of establishments.



Definition of Company Stages

0	Self-employed	1	2-9 employees
2	10-99 employees	3	100-499 employees
4	500+ employees		

Industry and occupation

Establishments

Number of Establishments by Company Stages

	2009		2015	
Stage	Establishments	Proportion	Establishments	Proportion
Stage 0	22,228	10%	23,761	8%
Stage 1	150,873	70%	224,464	76%
Stage 2	39,709	18%	42,893	15%
Stage 3	3,790	2%	3,760	1%
Stage 4	435	0.2%	426	0.1%
Total	217,035	100%	295,304	100%

Questions:

- What stage businesses have shaped the region's economic growth in the last 6 years?
- Which ones are growing or declining the most?
- Which stage of establishments are likely to shape the region's future economic growth?

section 02

Note: The table has some residual in 2009 establishments due to the lack of information on the Waller county.

Source: Youreconomy.org database 7

Industry and occupation

Jobs and Sales

Number of Jobs by Company Stages

Year	2009	2015	% Change
Stage 0	22,228	25,487	15%
Stage 1	558,042	879,974	58%
Stage 2	966,493	1,003,050	4%
Stage 3	658,280	623,422	-5%
Stage 4	533,653	639,441	19.8%
Total	2,738,696	3,171,374	16%

Sales (\$Billions, 2015) by Company Stages

Year	2009	2015	% Change
Stage 0	4.97	13.5	173%
Stage 1	133.36	266.7	100%
Stage 2	212.43	320.7	51%
Stage 3	161.53	192.3	19%
Stage 4	105.82	57.2	-45.9%
Total	618.12	850.52	38%

Questions

What establishments are the most numerous based on company stages?

What stages have experienced the largest growth? The greatest decline?

What company stage employs the largest number of people?

What stage captures the most sales?

Which ones have experienced the greatest percentage loss over the 2009-2015 period?

section 02

Note: The table has some residuals in 2009 establishments due to the lack of information on Waller county.

Source: Youreconomy.org database 8

Industry and occupation

Top ten industry sector employment growth

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
55	Management of Companies and Enterprises	26,535	42,305	15,770	59%	36%
21	Mining, Quarrying, and Oil and Gas Extraction	112,289	145,687	33,398	30%	56%
61	Educational Services	54,799	68,846	14,047	26%	16%
72	Accommodation and Food Services	213,398	261,546	48,148	23%	18%
42	Wholesale Trade	140,473	168,933	28,460	20%	15%
56	Administrative and Support and Waste Management and Remediation Services	229,141	275,191	46,050	20%	19%
62	Health Care and Social Assistance	284,911	338,903	53,992	19%	15%
31	Manufacturing	225,499	258,093	32,594	14%	7%
54	Professional, Scientific, and Technical Services	259,374	296,119	36,745	14%	14%
81	Other Services (except Public Administration)	186,060	210,200	24,140	13%	11%

Questions:

- What regional industry sectors have seen the greatest growth?
- Did they grow at the same rate as the state?
- What factors are causing the growth?

Industry and occupation

Top two industry sector employment decline

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
22	Utilities	17,515	16,422	-1,093	-6%	1%
51	Information	43,588	42,985	-603	-1%	1%

Questions:

- How does the industry sector make-up of the region compare to the rest of the state?
- Which industry sectors are growing and declining the most in employment?

03 Industry cluster analysis

Waller County Region, TX

Industry cluster analysis

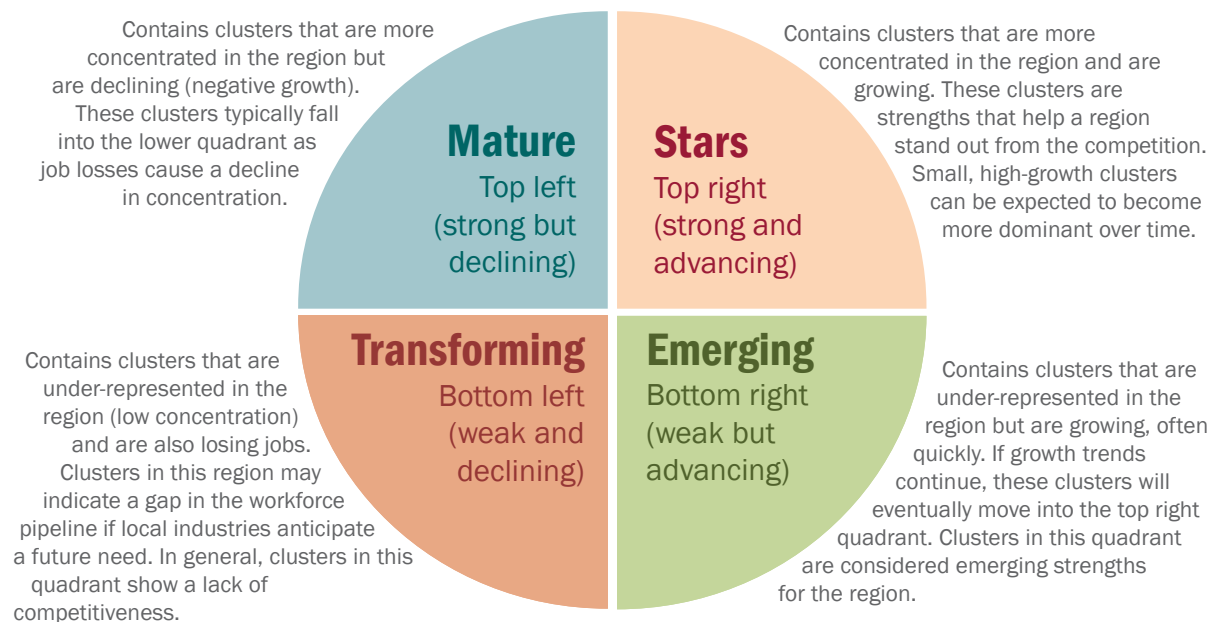
List of Clusters

- Advanced Materials
- Agribusiness, Food Processing & Technology
- Apparel & Textiles
- Arts, Entertainment, Recreation & Visitor Industries
- Biomedical/Biotechnical (Life Sciences)
- Business & Financial Services
- Chemicals
- Computer & Electronic Product Manufacturing
- Defense & Security
- Education & Knowledge Creation
- Electrical Equip, Appliance & Component Manufacturing
- Fabricated Metal Product Manufacturing
- Energy (Fossil & Renewable)
- Forest & Wood Products
- Glass & Ceramics
- Information Technology & Telecommunications
- Machinery Manufacturing
- Manufacturing Super-cluster
- Mining
- Primary Metal Manufacturing
- Printing & Publishing
- Transportation & Logistics
- Transportation Equipment Manufacturing

Industry cluster analysis

How to interpret cluster data results

The graph's four quadrants tell a different story for each cluster.

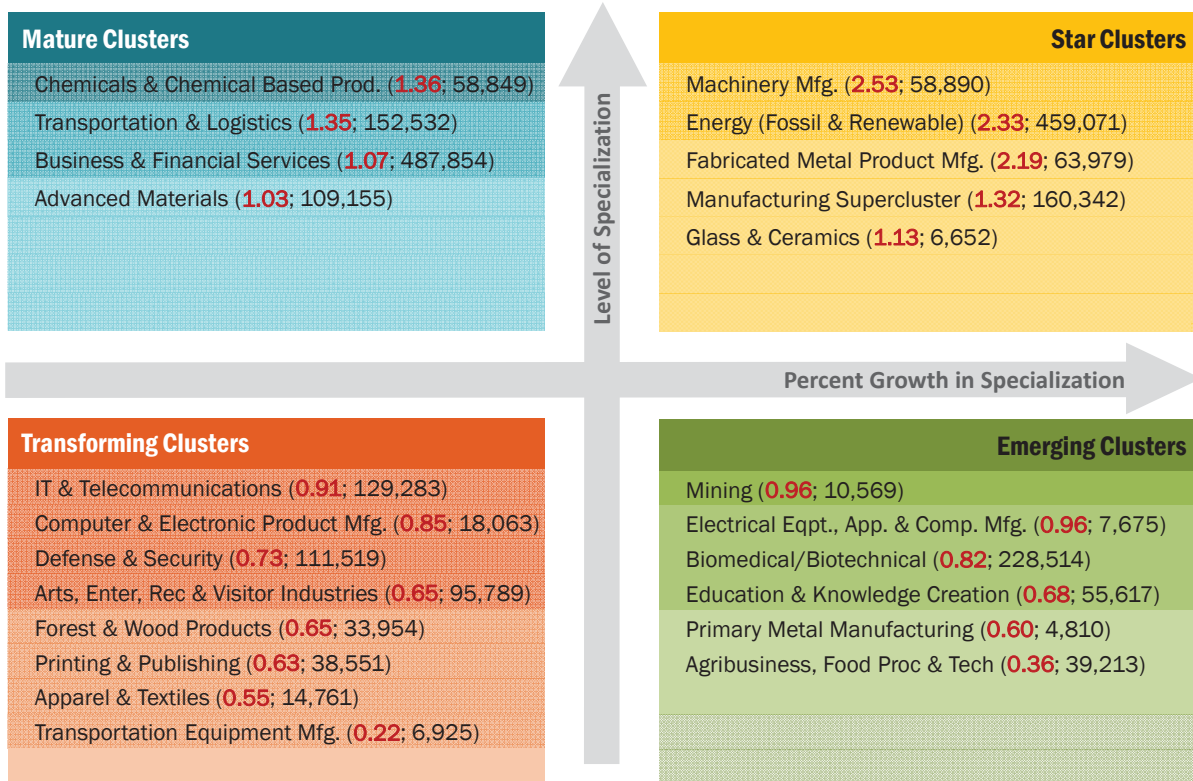


section 03

Modified from: <http://www.charlestonregionaldata.com/bubble-chart-explanation/>

13

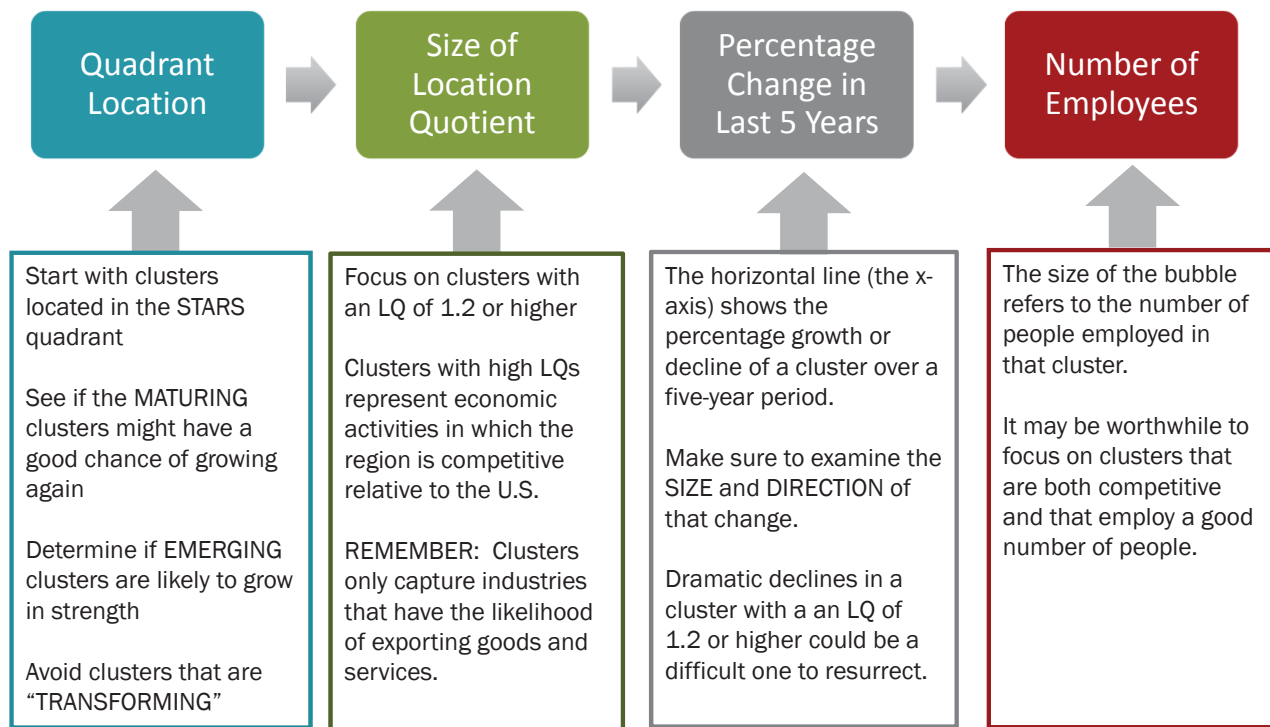
Industry cluster analysis



section 03

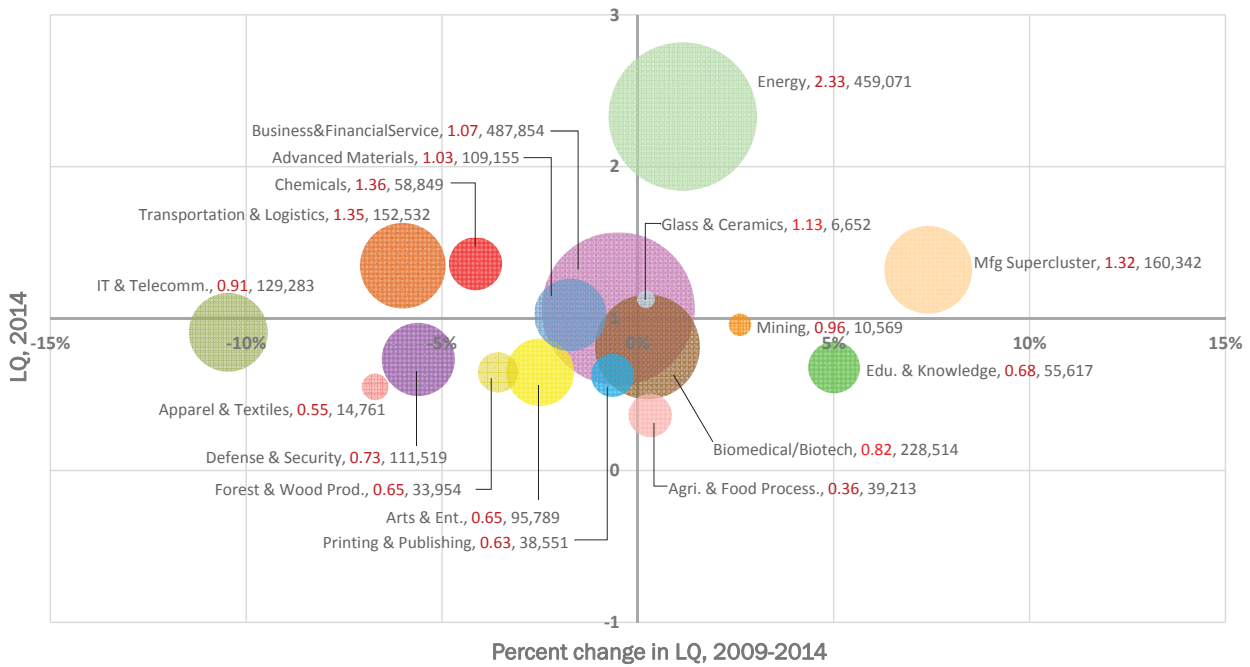
NOTE: The first number after each cluster represents the number of total jobs (full and part time jobs by place of work) in that cluster in the region in 2014. The clusters are sorted in decreasing order by location quotient as shown in the bubble chart.

Bubble Chart: What to Look at First



Industry and occupation

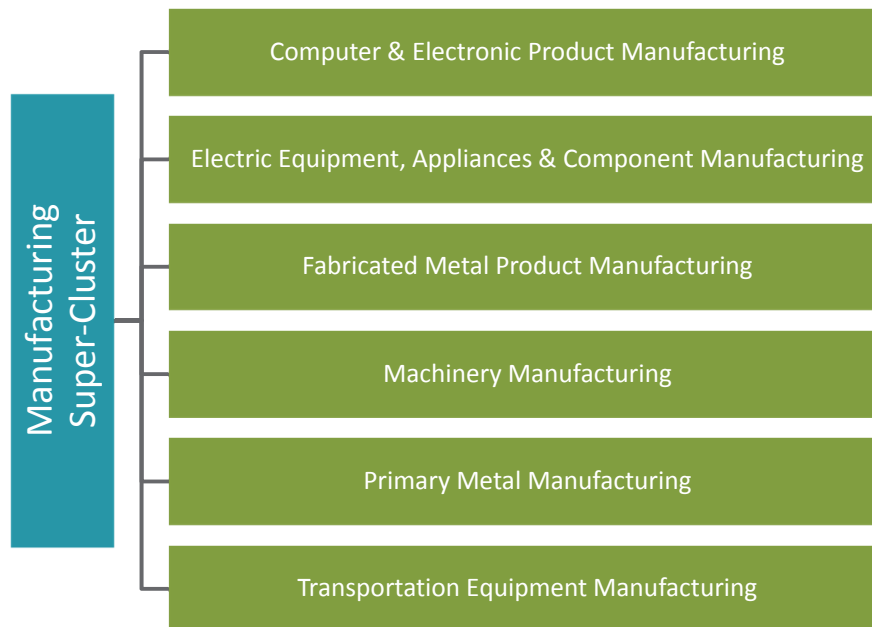
Industry cluster bubble chart



Note: Label includes cluster name, LQ in 2014, and Employment in 2014.

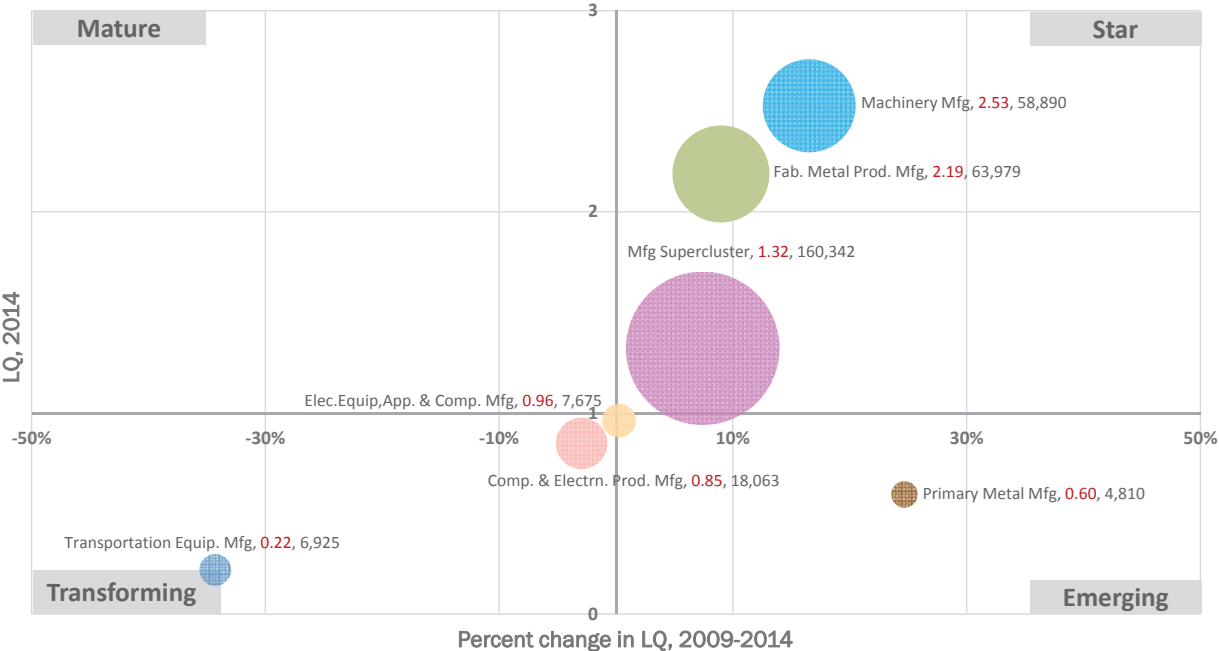
The Manufacturing Super-Cluster

Please note that this is not a cluster that a SET region should select. Rather, focus on the manufacturing sub-clusters that are important to that super-cluster.



Industry and occupation

Manufacturing sub-cluster bubble chart



Note: Label includes cluster name, LQ in 2014, and Employment in 2014.

Industry and occupation

For your region

Mature Industries

Four industry clusters in the Waller County Region are in the Matured stage: Chemicals; Transportation & Logistics; Business & Financial Services; and Advanced Materials. The mature industries are relatively concentrated, but their growth is trending downward. It is worth noting, however, that the Region may find it worthwhile to invest in efforts to shore up the concentrations of these industries.

Transforming Industries

Transforming clusters capture the mix of industries that are experiencing relative decline and limited export capability. In the Region, eight industry clusters are all Transforming clusters, IT & Telecom.; Computer & Electronic Product Mfg.; Defense & Security; Arts, Ent., Rec. & Visitor Industries; Forest & Wood Products; Printing & Publishing; Apparel & Textiles; and Transportation Equipment Mfg. Any amount of growth in these industries would require relatively large investments.

Star Industries

Star industry clusters are highly concentrated, exporting and still experiencing growth in the region. Four Star industry clusters in the Waller County Region are Machinery Mfg.; Energy; Fabricated Metal Prod. Mfg.; and Glass & Ceramics. These clusters have higher job concentrations in the region compared to the U.S.

Emerging Industries

Industry clusters that may be poised for the future growth are classified as “Emerging.” There are six Emerging clusters in total in the Waller County Region: Mining; Electrical Equipment Appliance & Component Mfg.; Biomedical/Biotechnical; Education & Knowledge Creation; Primary Metal Mfg.; and Agribusiness, Food Processing & Technology.

section 03

Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors)¹⁹

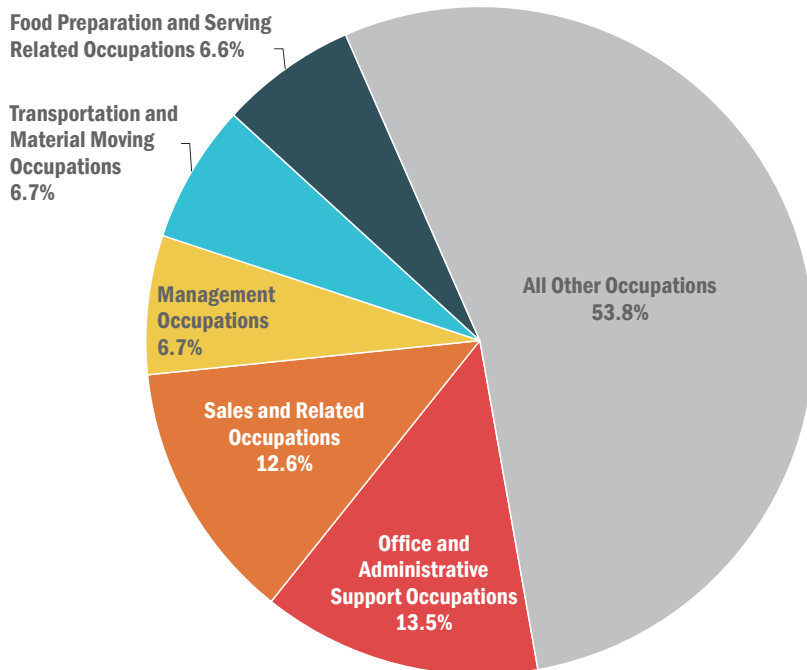
04 occupations

Top occupations

STEM occupations

Industry and occupation

Top five occupations in 2014



Questions:

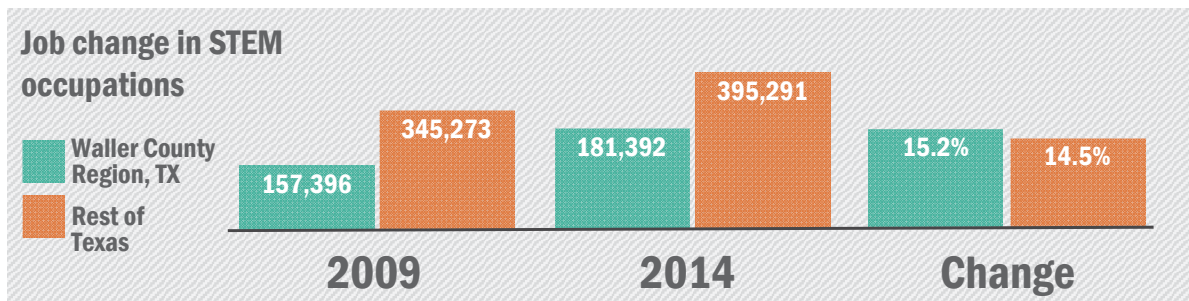
- What are the education and skill requirements for these occupations?
- Do the emerging and star clusters align with the top occupations?
- What type salaries do these occupations typically provide?

section 04

Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors) 21

Industry and occupation

Science, Technology, Engineering & Math



Questions:

- How do STEM jobs compare to the state?
- What has been the trend of STEM jobs over time?
- How important are STEM jobs to the region's Star and Emerging clusters?

*Note: STEM and STEM-related occupation definitions from BLS (2010)

section 04

Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors) 22

Report Contributors

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Report Authors

Bo Beaulieu, PhD
Andrey Zhalnin, PhD
Indraneel Kumar, PhD



Data Analysis

Ayoung Kim
Andrey Zhalnin, PhD
Indraneel Kumar, PhD



Report Design

Tyler Wright

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The Purdue Center for Regional Development (PCRD) seeks to pioneer new ideas and strategies that contribute to regional collaboration, innovation and prosperity.

For more information,
please contact:

Dr. Bo Beaulieu,
PCRD Director:
ljb@purdue.edu

Or

765-494-7273

October 2016

APPENDIX III:

WALLER COUNTY STRATEGIC PLANNING GUIDE: 2017-2037

Waller County

A Community Approach to Economic Growth

“Katy, Brookshire, Pattison, Waller, Prairie View, Pine Island, Hempstead”

Waller County Strategic Planning Guide: 2017-2037

"Katy, Brookshire, Pattison, Waller, Prairie View, Pine Island, Hempstead"

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Dr. Corey Bradford, Senior Vice President for Business Affairs

Dr. James Palmer, Interim Dean and Director of Land Grant Programs and Associate Provost for Academic Affairs

Dr. Alton B. Johnson, Former Dean and Director of Land Grant Programs

Waller County Strategic Planning Committee

County Judge Trey Duhon, Committee Advisor

Commissioner Jeron Barnett, Committee Advisor

Jimmy Henry, Committee Chair, Program Leader for Community & Economic Development, Prairie View A&M

Danielle Hairston-Green, Committee Co-Chair, Program Specialist for Family & Consumer Sciences, Prairie View A&M University

Rozenia Toney, Secretary, Community & Economic Development, Prairie View A&M

Dr. Noel Estwick, Planning Specialist, Prairie View A&M

Lloyd Hebert, Business Specialist Community & Economic Development, Prairie View A&M

Dr. Terrance Finley, Office of Business Affairs, Prairie View A&M

Waller County Strategic Planning Committee

Dr. Sam Arungwa, Communities That Care

Vince Yokem, Waller County EDP

Mary Anne Piacentini, Katy Prairie Conservancy

Jude Daniels, City of Prairie View Economic Development

Ronnie McDonald, Texas Rural Leadership Program

Bridgett Ross, Small Business Development Ctr.

Stephan Gage, Houston Galveston Area Council

Lisa Mutchler, Texas A&M Engineering Extension Service

Sue Ann Palmore, Texas A&M Engineering Extension Service

External Agencies

Dr. Jack Steele, Director, Houston Galveston Area Council

Dr. John Cooper, Director, Texas Target Communities

Mrs. Jaimie Masterson, Texas Target Communities, Texas A&M

Dr. Bo Beaulieu, Center for Regional Development, Purdue University

Jennifer Powis, Katy Drainage District

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Elected Officials

Trey Duhon, Waller County Judge

Jeron Barnett, Waller County Commissioner

John Amsler, Waller County Commissioner

Russell Klecka, Waller County Commissioner

Justin Beckendorff, Waller County Commissioner

Mayor Michael Wolfe, City of Hempstead

Mayor Fabol Hughes, City of Katy

Former Mayor Debra Ferris, Town of Pine Island

Former Mayor Frank Jackson, City of Prairie View

Mayor Danny Marburger, City of Waller



SECTION I.

INTRODUCTION AND EXECUTIVE SUMMARY

SECTION I. INTRODUCTION AND EXECUTIVE SUMMARY

A. Introduction

Over the years, Waller County has seen continued growth and development affecting the landscape of the community. In 2013 Commissioner Jeron Barnett reached out to one of the Waller County Extension Agents of Prairie View A&M University Cooperative Extension Program to seek assistance with a Strategic Plan that would address the growth Waller County is experiencing. Meetings were held and committees were established mostly including of the College of Agriculture and Human Sciences staff (Research, Academics, and Extension). For various reasons the meetings discontinued and the effort was momentarily suspended. In 2015 Judge Trey Duhon reintroduced the effort and began to meet with Prairie View A&M University Administration as well as his Commissioners Court to resurrect the Strategic Planning Effort. After months of planning and meeting the Waller County Strategic Planning Efforts officially began with the Waller County Strategic Plan Breakfast held Thursday, March 31, 2016.

B. Philosophy and Approach

The strategic plan was developed, in 5 phases, by viewing data about the county which included indicators of how well our county departments are achieving their current goals, any issues occurring in our community that affect our ability to deliver services, elected office and citizen input. A vision and high level goals were developed by the Waller County Strategic Planning team to describe “what” the stakeholders believed Waller County would look like in 5-

10 years. The vision and goals are the basis for creating a strategic plan and “how” Waller County will achieve these goals. The objectives in the strategic plan are the foundation for creating tactical work plans to manage what needs to happen in order for the objectives to be fulfilled.

C. Summary of the State of the County

Waller County is on the northwest side of Harris County. It offers the best of a rural lifestyle and a short commute to the nation’s fourth largest city. Citizens of Waller County enjoy access to many social and economic opportunities already and the outlook for expanding access to opportunities is positive. Waller is set to grow ahead of the state and H-GAC 8 by 2050. The County expects an increasing Hispanic population, a trend seen throughout Texas. Approximately 34% of the population in Waller is college educated and 46% of residents are enrolled in schools and colleges. Waller County is a home to PVAMU and four (4) independent school districts (Hempstead, Royal, Katy and Waller).

Proximity to Houston plays an important role in the economy of the County. Manufacturing and agriculture sectors lead the economy. These sectors are more specialized in the County in comparison to Texas. Education services follow in level of impact, due to the presence of many school districts and PVAMU. Employment ‘by place of residence’ has increased significantly by 40%, from 2004 to 2014. Texas in

comparison increased by 25% over that span and the nation only increased by 13%. Roughly, 19% of people in Waller County are living under poverty. Of those in poverty, the City of Prairie View has the most due to the student population at PVAMU. The County does not have many affordable housing units, but 40% of all homes are under \$100,000. The City of Houston is rapidly encroaching upon Waller County, threatening to disrupt the rural lifestyle many County residents enjoy. As Houston expands, there will be an increase in impervious surface cover, which will increase the risk of flooding.

D. Vision

Waller County will be one of the first strategically-planned counties in Texas with a focus on responsible growth that preserves the heritage of the County and its natural resources.

E. Strategic Plan Focus Area

Municipalities

- I. Preserve and enhance natural resources, with a focus on water management.
- II. Promote smart, clean growth with consistent regulations and codes throughout Waller County.
- III. Attract higher paying industries and alleviate economic disparity in the County.
- IV. Enhance the connectivity of Waller County with public transportation, particularly to and from Houston.
- V. Establish a reputation for high quality education capable of drawing in and

retaining a skilled workforce in the County, to the benefit of attracting targeted businesses to and development in the area.

VI. Promote County and City collaborations to preserve and enhance the quality of life and infrastructure in Waller County.

Infrastructure & Broadband (Drainage & Flooding)

- I. Create larger budgets for infrastructure.
- II. Plan for future county-wide wireless.
- III. Increase electrical system reliability and capacity.

Economic Development/Poverty

- I. Create policies and regulation methods for targeted development.
- II. Improve workforce quality and viability.
- III. Attract a broader array of desirable amenities.

Housing

- I. Increase residential and business district connectivity and attractiveness to visitors and residents alike.
- II. Obtain and take advantage of resources necessary to promote economic and community development throughout Waller County.
- III. Provide educational resources to attract new residents and retain current residents in the community.

Public Safety & Crime

- I. Engage in PVAMU College law enforcement internships.

II. Enhance community relations with law enforcement.

III. Establish a uniform and organized method to conduct performance ranking (evidence based policing).

Education

I. Establish a collaborative network with other ISDs in Waller County.

II. Foster a stronger relationship between ISDs and Prairie View A&M University (PVAMU).

III. Increase ISD visibility.

Transportation

I. Review and update County Major Thoroughfare and Freeway Plan (MTFP) and development regulations.

II. Develop county and regional drainage & detention policies.

III. Develop a strategy to allow for city growth that preserves the natural aspects of more rural areas.

IV. Identify the County's priorities in terms of how it wants to develop.

Agriculture and Natural Resources

I. Preserve the rural nature of Waller County.

II. Preserve agriculture in Waller County.

III. Promote heritage-based economic drivers in Waller County.

IV. Aim for targeted development.

Parks and Open Space

I. Preserve places with historical, cultural, and natural resource value.

II. Protect the quality and quantity of Waller County's water resources.

III. Acquire county parks.

IV. Create opportunities for bike and pedestrian trails.





SECTION II.

STATE OF THE COUNTY

SECTION II. STATE OF THE COUNTY

A. Background and Staff

Waller is a rural county bounded on the east by Harris County and the west by the Brazos River. It is situated in the lower plain of southeast Texas, with 513 sq. miles of land and 4.4 sq. miles of water. The county is bordered by Grimes County to the north, Montgomery County to the northeast, Fort Bend County to the south, Austin County to the west and Washington County to the northwest.

The County's climate is temperate, characterized by warm and mild winters. The average temperature in July is 95°F and 39° F in January. The average annual rainfall in the county is 42 inches. Cities in the County include Hempstead, Prairie View, Brookshire, Waller, Pine Island and part of Katy, which also has territory in Harris and Fort Bend County. The County's economy is mainly dependent on farming, cattle, forest products, construction and manufacturing. PVAMU is a major university and a part of the Texas A&M University system.

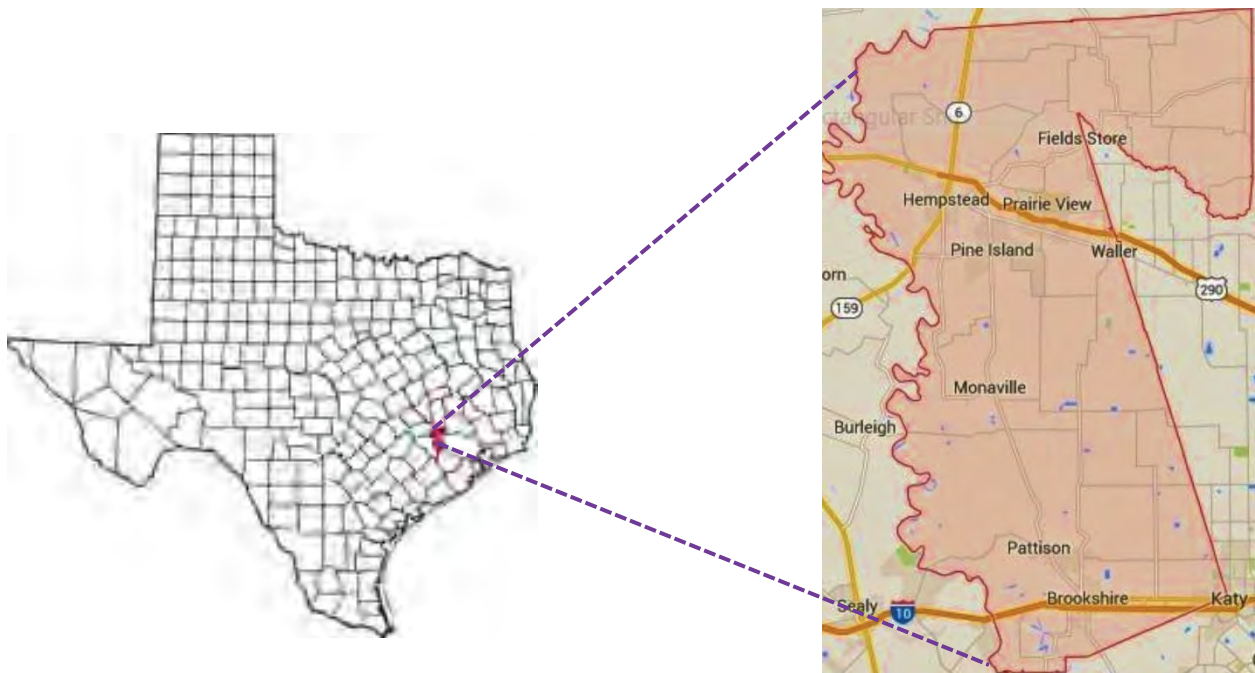


Figure A.1: Location Waller County, TX

B. Report Contents

Waller County was established in 1873. The County began to develop in the late nineteenth century with the implementation of the Houston and Texas Central Railway. The county seat (Hempstead) was developed by the railway companies. The Town of Brookshire began to emerge as a center of activity after the Missouri, Kansas, and Texas Railways passed through the city from Houston in 1893. Today, both railways are property of the Union Pacific Railway network.



Figure B.1: Courthouse, Hempstead

Source: courthousehistory.com

In the late 1800's, cotton was the major product in the county's economy, along with cattle. Waller County was home to one of the first plantations in the southern part of the country.

The cotton-based economy introduced African-Americans to Waller County as

slaves. After emancipation however, many stayed in the area. The 1880 census reported 65% of its population as being African Americans. Today the African-American population in Waller County is 26%.

The participation of African Americans in politics increased and they were elected to county as well as to state offices. Cultural diversity enhanced with immigrants from Central and Eastern Europe, Ireland and Italy arriving in late nineteenth century, together with Germans, Polish and Czech immigrants arriving in the beginning of the twentieth Century



Figure B.2: Waller County Courthouse

Source: courthousehistory.com

If the railway helped to develop the area in the beginning of the century, the highways have the same function today. The anticipated, and then actual, construction of the new Highway 290 by-pass from Houston spurred a blossoming population and

expansion in the eastern part of Waller County that affected both the Waller Independent School District and the City of Waller.

In addition to US 290, Interstate 10 cuts through the Waller County near its Southern border. Waller County's position on Interstate 10 (which connects Houston to San Antonio) makes Waller an important piece in the region's economy, and raises the value of advanced planning for county development.

C. Population

1. Population Density

The population of Waller County (44,825) is mostly rural with a population density less than 100 people per square mile (Figure C.1.1). The population of Waller County is clustered around the five cities: the City of Hempstead, Prairie View Brookshire, Pine Island and the portion of Katy. The population density of Waller County (87 per sq. mile) is less than the Texas average (99.9 per sq. mile)



Figure B.3: I-10 and I-45

Source: Google Maps, 2016

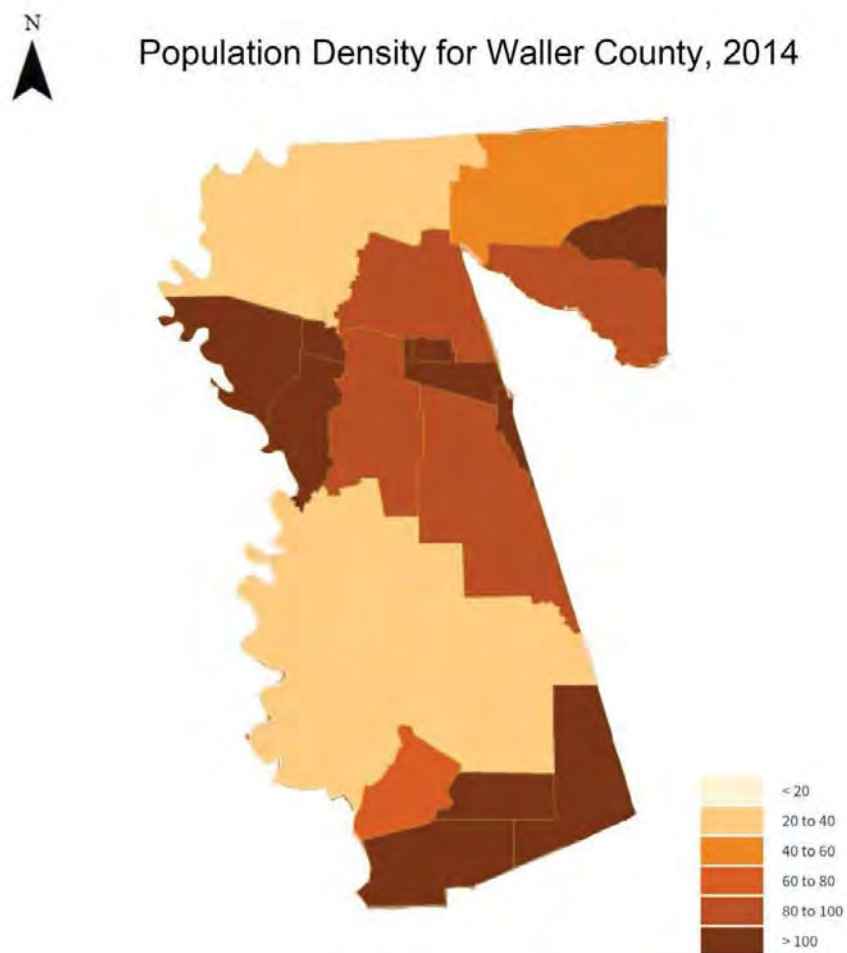


Figure C. 1: Population Density for Waller County, 2014

Source: 2014 Data from the Social Explorer

2. Population Estimates and Projection

In 2014, there were 44,825 people residing in Waller County, increasing from 32,663 people in 2000 and 43,205 people in 2010. The major population centers include

portions of Katy (15,071), Hempstead (6,197), Prairie View (5,890), Brookshire (4,804), and Waller (1,956). Waller grew faster than the Houston- Galveston Area Council (H-GAC) and Texas from 2000 to

2010 and faster than Texas over the entire 2000 to 2014 time period. Population projections for Waller County obtained from the Office of the State Demographer (OSD) and from H-GAC 8 are biennial population projections for the state and the County by age, sex, and race/ethnicity. Population projections account for special populations, fertility rates, mortality rates, and residual migration rates each year from 2015 to 2050. H-GAC also provides projections for 2010 to 2040, which are updated every

quarter. These projections include population, employment and land use.

For the most part, Waller is set to grow at a faster pace than the H-GAC 8 and the state as a whole, for each decade through 2050. The H-GAC projection for Waller is highly aggressive for the 2020 to 2030 time period than the OSD 0.5 scenario projections. Estimates from the 2000 and 2010 Census are presented with projections from both the OSD 0.5 scenario and the H-GA

	Estimates		Projections				
	2000	2010	2020	2030	2040	2050	Source
Waller	32,663	43,205	52,133	62,492	74,071	86,862	OSD
			46,114	87,675	1,09,334	-	H-GAC
H-GAC 8	4,669,571	5,891,999	6,865,178	7,886,965	8,921,141	9,955,782	OSD
			7,221,595	8,632,761	10,018,623	-	H-GAC
Texas	20,851,820	25,145,561	28,813,282	32,680,217	36,550,595	40,502,749	OSD

Table C.1: Population Estimates and Projections for Waller County, H-GAC 8, and Texas (number of persons)

	Estimates (% change)	Projections (% change)				
	2000 to 2010	2010 to 2020	2020 to 2030	2030 to 2040	2040 to 2050	Source
Waller	32.2	20.7	19.9	18.5	17.3	OSD
	34	17	90	25	-	H-GAC
H-GAC 8	26.2	16.5	14.9	13.1	11.6	OSD
	27	24	20	16	-	H-GAC
Texas	20.6	14.6	13.4	11.8	10.8	OSD

Table C.2: Population Estimates and Projections for Waller County, H-GAC 8, and Texas (percentage change)

Source: OSD and H-GAC Forecast (2016)

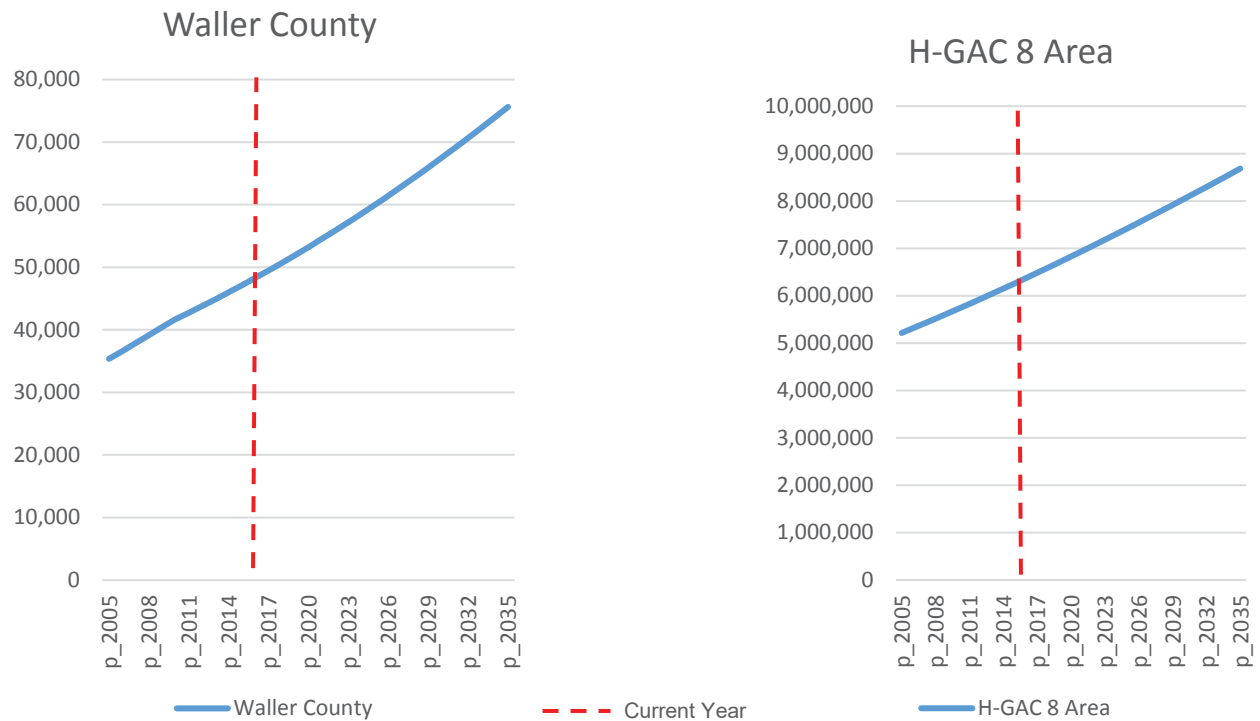


Figure C.2: Population Projections

D. Race

Figure D.1 shows the distribution of people by race throughout the County. The races are relatively dispersed, though African-Americans are clustered around the larger cities, particularly Prairie View. There are few if any African-Americans in the north-eastern portion of the County. According to the US Census, Waller County's population is 45% of White, compared to Texas at 44%

(Figure D.2). Waller County has a larger proportion of African-Americans than Texas and smaller proportion of Asian. Although Texas has greater proportion of Hispanics than Waller

County. However, by 2050 the County's Hispanic population is projected to be over 50%, which is a consistent trend in Texas.



Race Distribution in Waller County, 2014

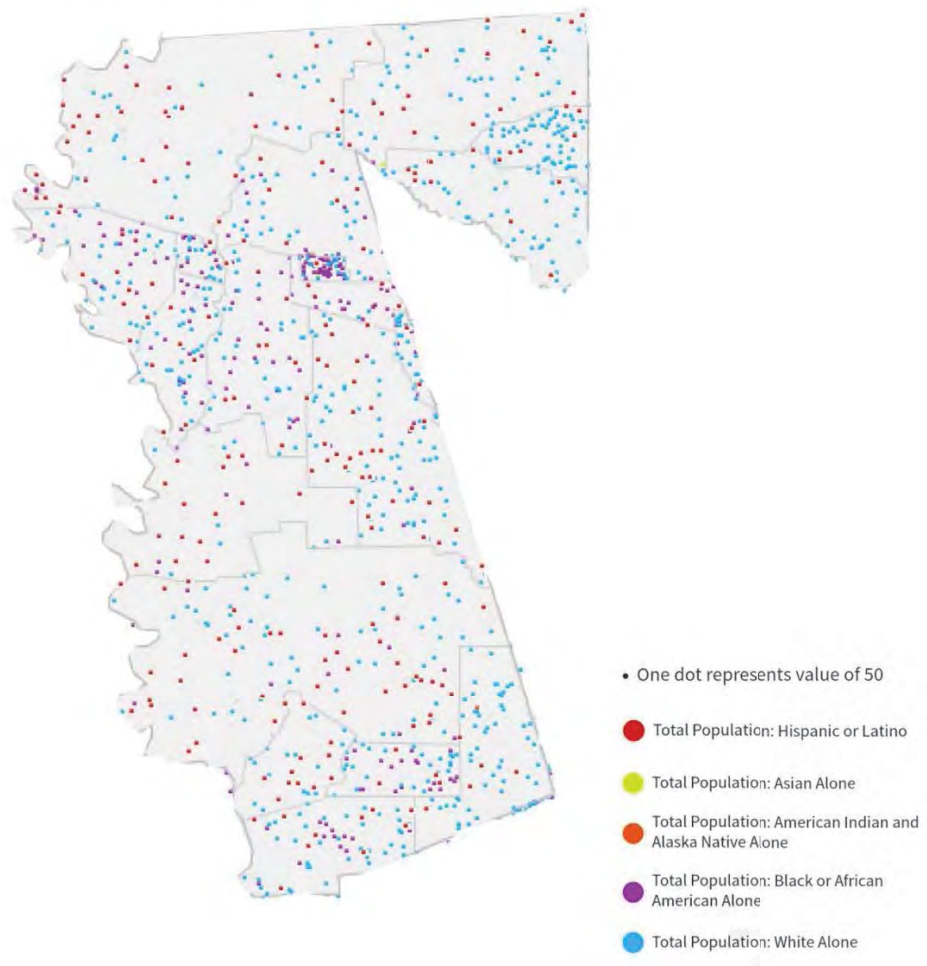


Figure D.1: Race Dot Map for Waller County, 2014

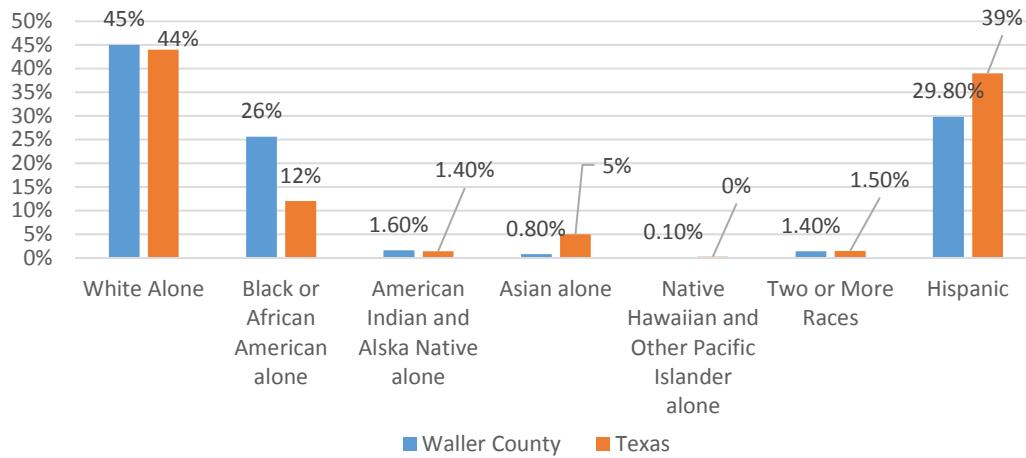


Figure D.2: Race and Ethnicity by Waller County and Texas

Source: U.S. Census

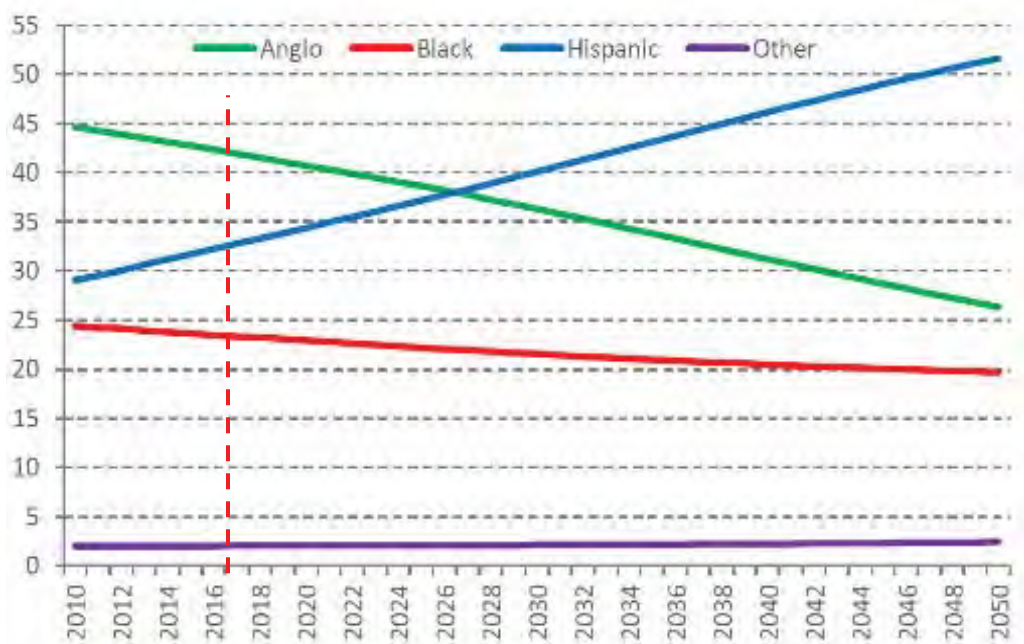


Figure D.3: Population Projection by Race as a % of Total Population for Waller County

Source: OSD

E. Age

The age pyramid for Waller County is shown in Figure E.1. Waller County has the largest population of recent high school graduates

(20 to 24 year olds) compared to surrounding counties likely due to the presence of PVAMU. Waller County also has a large population of children and young people, and a greater proportion of people

from 45 to 60 years old when compared to other age groups in the County. There is a much larger proportion of those ages 25 to 44 in Texas than Waller County. The age pyramid for Texas in 2015 is displayed in Figure E.2. Waller County's age and sex distribution slightly resembles a cup shape, which means an aging society. Based on population projections, there will be

proportionally more people ages 45 to 64 and 65-plus in the next 20 years—or more mid-career residents, retirees, and elderly. The less than 18, and 25 to 44 age groups will remain relatively stable for the next few years while the 18 to 24 age group is expected to decline. This could be a negative sign as the County will lose its younger population (Figure E.3).

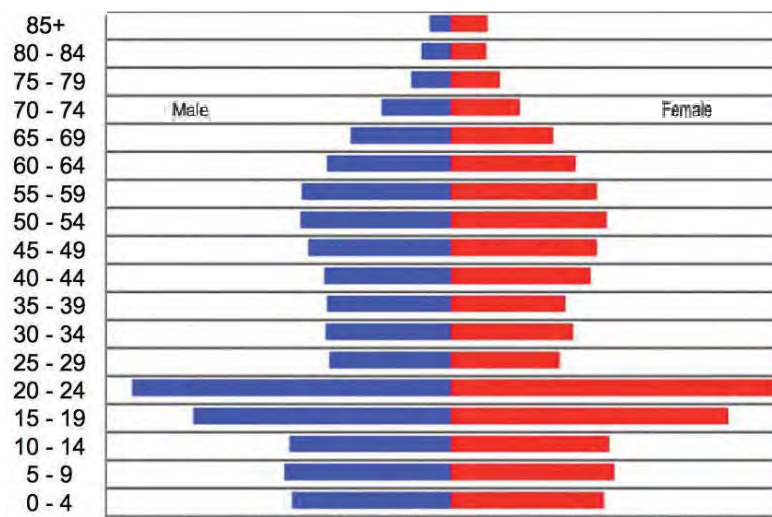


Figure E.1: Age Distribution in Waller County

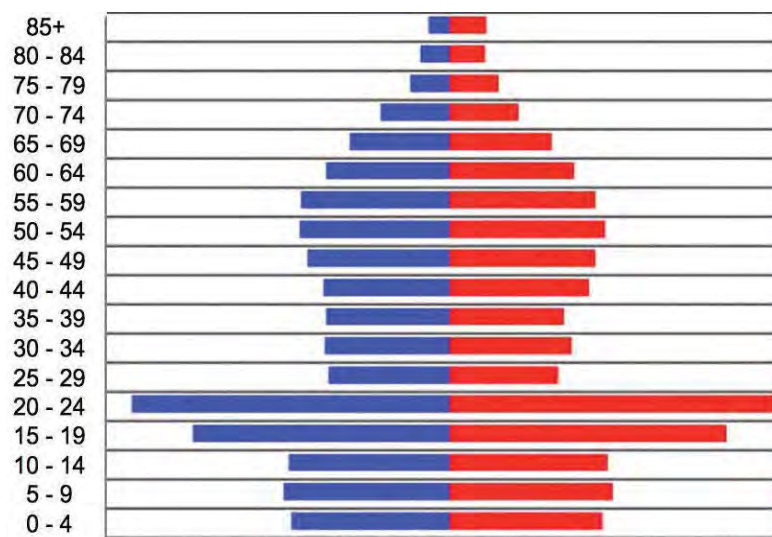


Figure E.2: Age Distribution in Texas

Source: U.S. Census

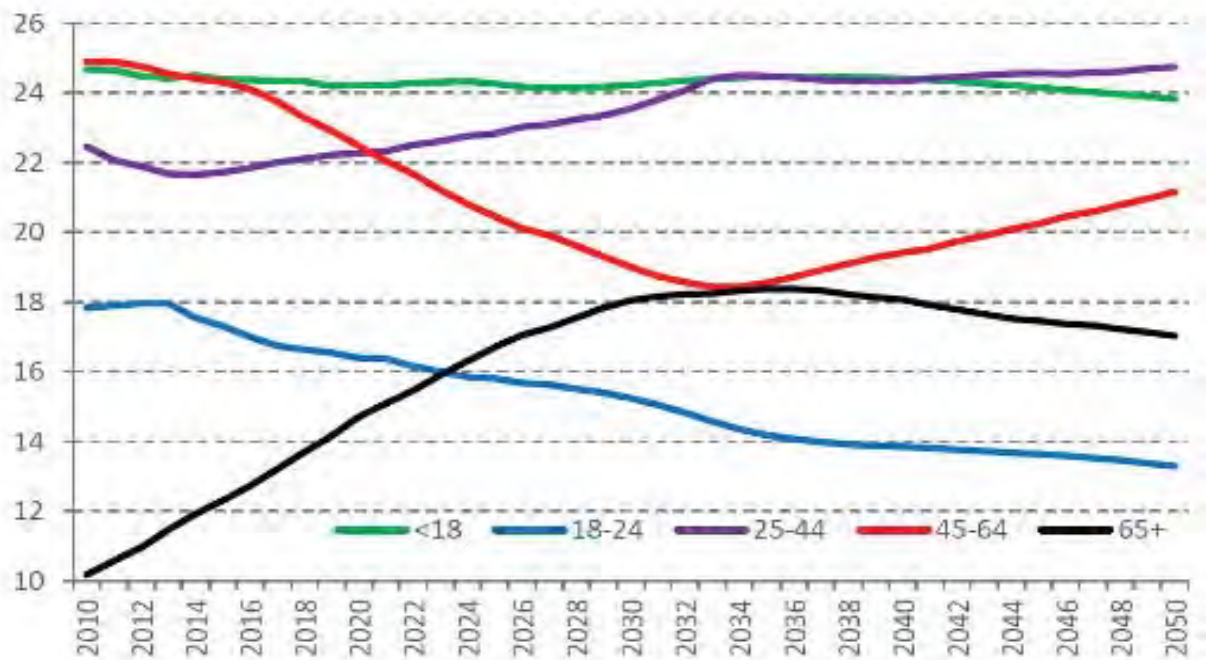


Figure E.3: Population projections by Age Group (Percentage of Total)

Source: OSD

F. Education

While more (34%) residents have a high school education in Waller than in Texas and the US, Waller falls slightly short of Texas and the U.S. with regard to college attainment. The lower levels of attainment for associate, bachelor and graduate degrees is surprising considering the presence and prominence of PVAMU (see Figure F. 1). As observed in Figure F.2, eighty percent of person's age 25 or older in Waller

County are high school graduates. Also, 46% of residents are enrolled in undergraduate programs, which is higher than all neighboring counties: Austin, Washington, Grimes, Harris and Fort Bend. Not surprising, the City of Prairie View, due to the presence of PVAMU has a college population equal to about 95% of all students in school. Other cities have a decent population of school going children between the ages 1-12.

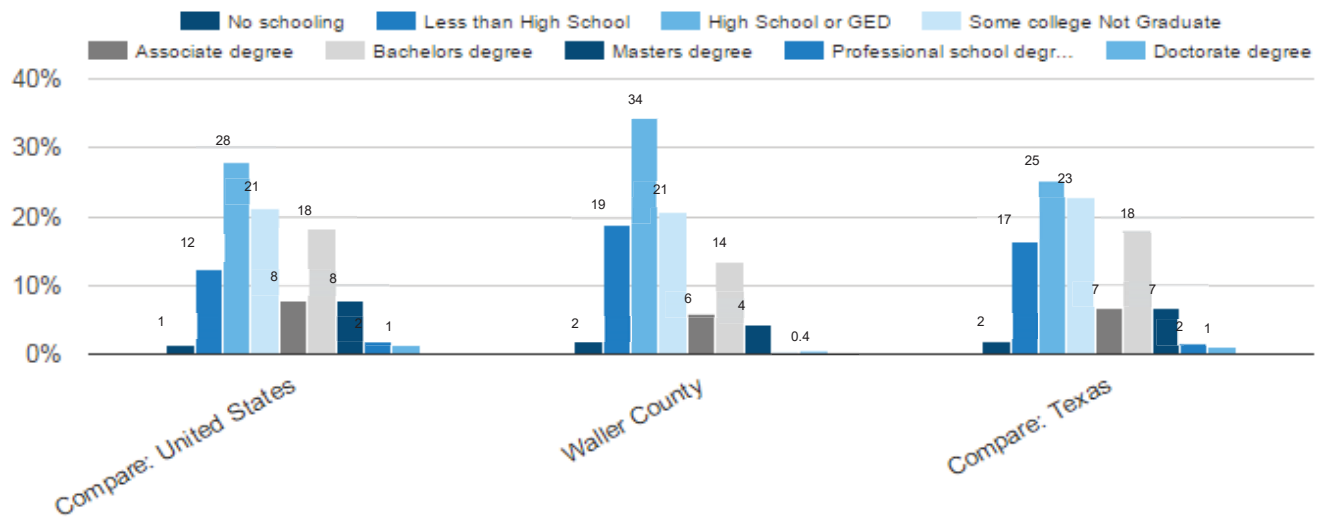


Figure F. 1: Education; Attainment Detailed Comparison (Age 25+)

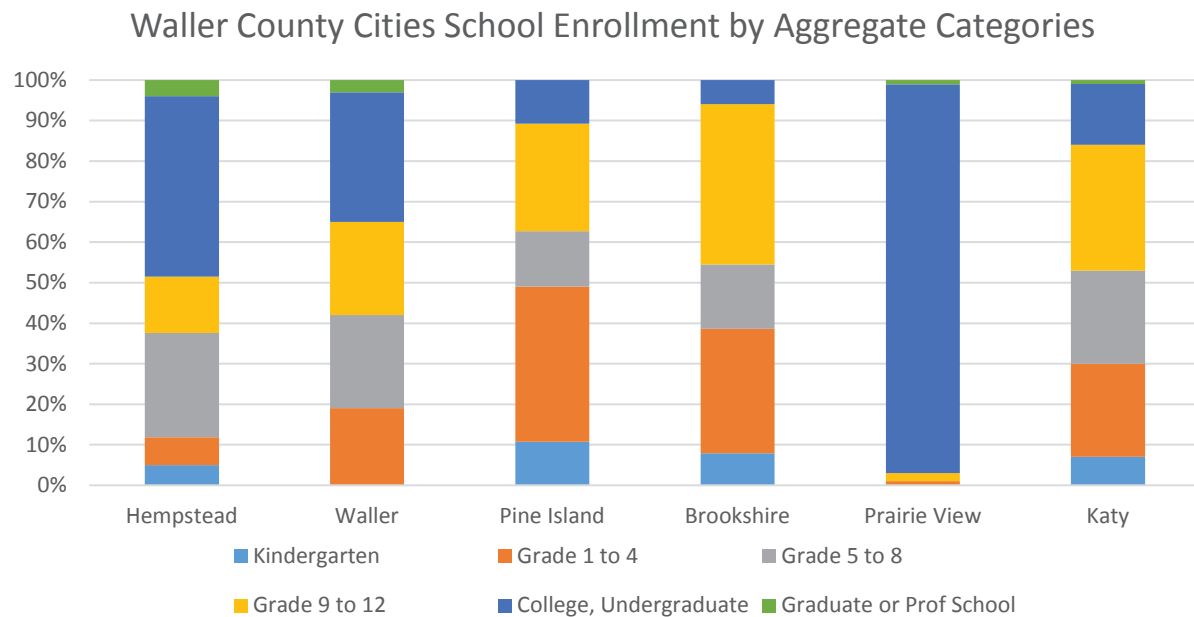


Figure F.2: Waller County; School Enrollment by Aggregate Categories

Source: U.S. Census Bureau 2014, www.towncharts.com

G. Employment

1. Overview

As of 2014 there were 23,038 people employed in Waller County, including 17,984 wage and salary employees. Personal income per capita for the county was \$34,078, which has grown by \$10,000 from 2004 to 2014. Total Employment has increased by 22.7 percent and 43.3 percent since 2009 and 2004, respectively.

Major employers in the county include.

- Briarwood- Brookwood Inc.
- Creekside Nursery
- Hempstead ISD
- Igloo
- PBS of Central Florida
- Prairie View A&M University
- Royal ISD
- Waller ISD
- Wal-Mart associates Inc.

The industry sectors with the largest employment are Manufacturing (3,281), Educational Services (2,688), and Construction (1,364).

2. Unemployment Rate

The unemployment rate in Waller County has gone down since 2010, which is a good indicator of the economic growth. As we see in Texas and Waller County have similar trends. Since 2010 unemployment has dropped from approximately 8% to 4.5% in Waller and 4.7% in Texas.

In addition, as indicated in Figure G.2.2, most working people in the County are either self-employed or work for a private company (Figure G.2.2).

Figure G.2.3 above indicates that most of the people in the county are employed. Most of the unemployment is concentrated around Prairie View A&M University (Figure G.2.4) likely due to the presence of students.

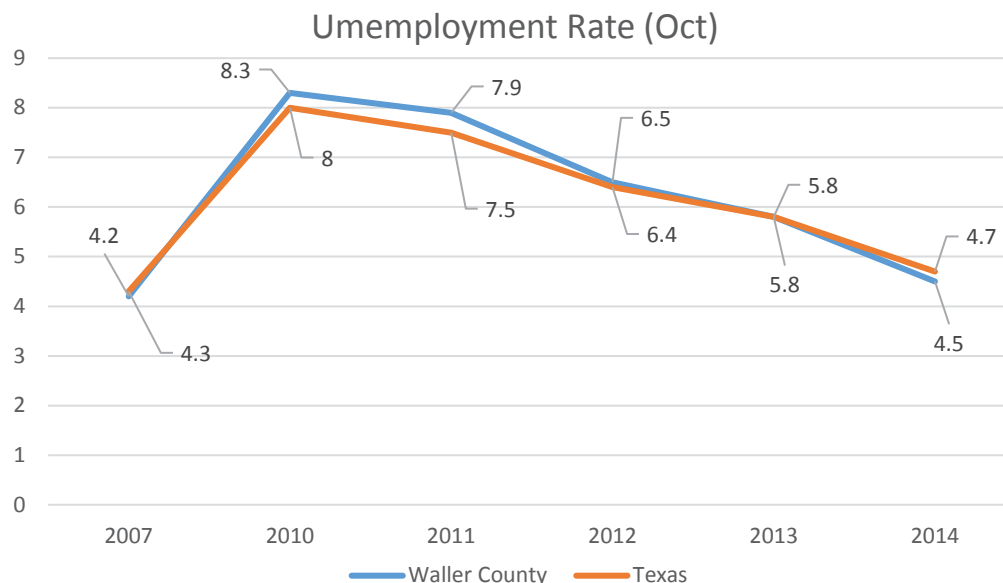


Figure G.2.1: Trend of Unemployment Rate

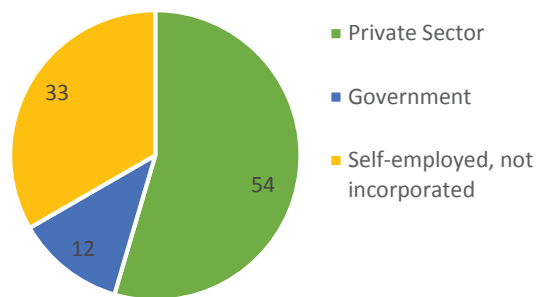


Figure G.2.2: Types of Workers

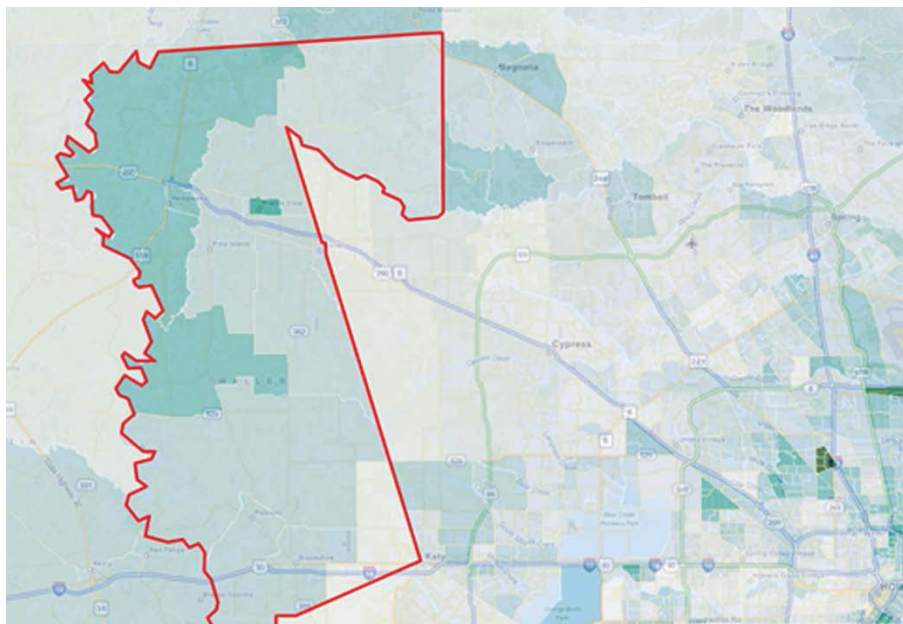


Figure G.2.3: Unemployment Rate (%)

Source: http://www.city-data.com/county/Waller_County-TX.html

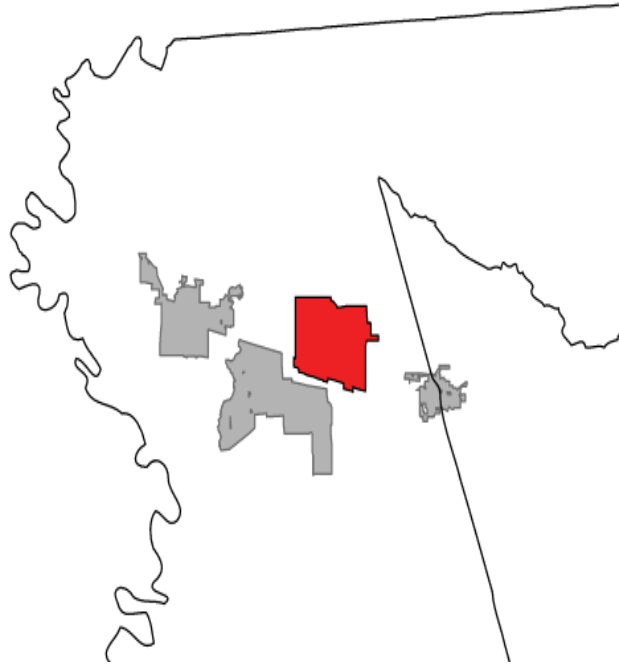


Figure G.2.4: Prairie View A&M Campus

Source: https://en.wikipedia.org/wiki/Prairie_View,_Texas

H. Economy

1. Economic structure

As shown in Figure H.1.1, five industry sectors provide over 50% of the industry employment shares in Waller County:

- Health Care and Social Assistance,

- Educational Services,
- Retail trade,
- Manufacturing
- Construction.

Among the five, the Manufacturing, Construction and Educational Services have a larger relative percentage of employment shares than Texas.

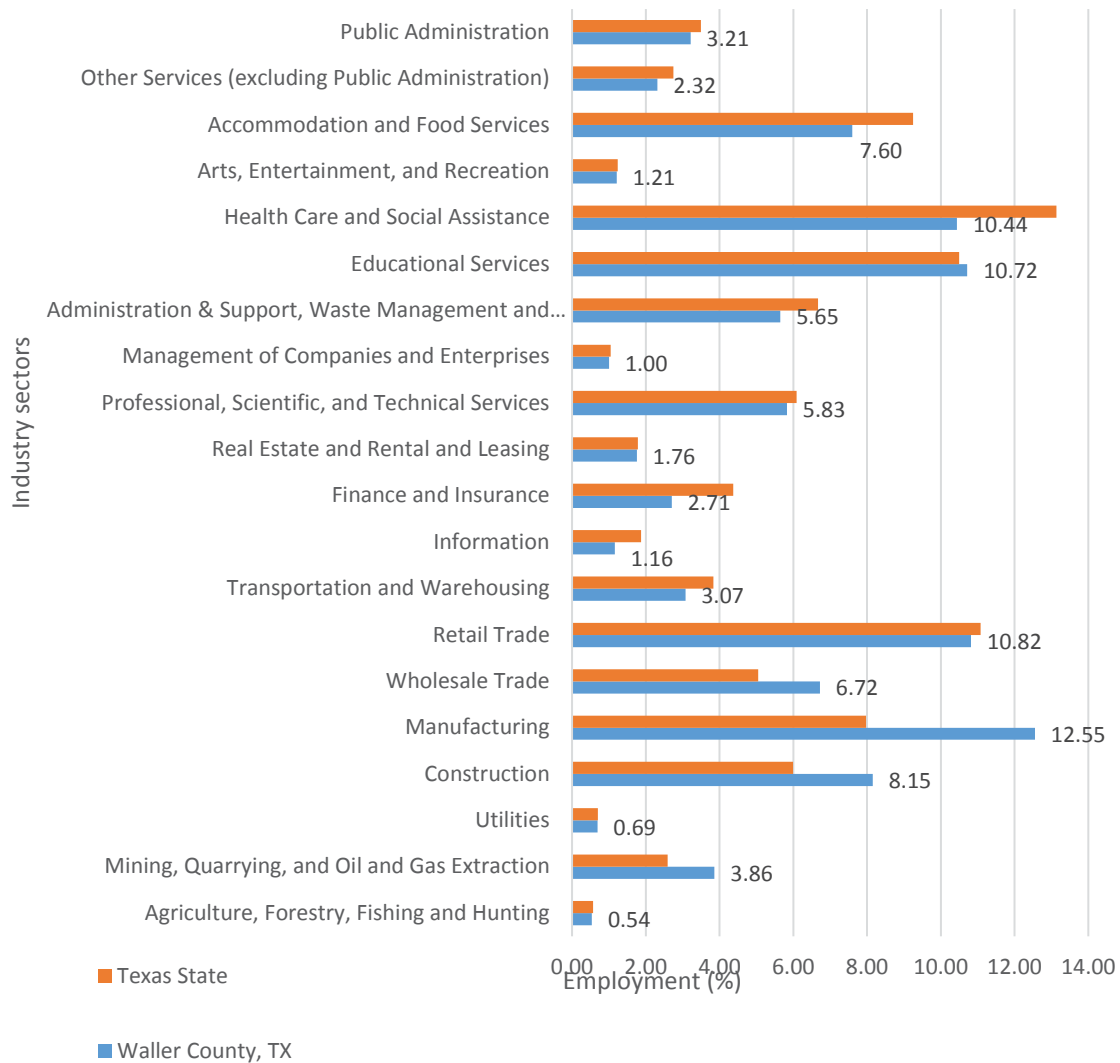


Figure H.1.1: Employment Shares in Waller County and

2. Characteristics of Regional Economy

A location quotient (LQ) is a method to quantify how concentrated a particular industry is in a region as compared to a

larger region, such as Texas. A location quotient value greater than 1.0 means that the industry sector is a specialized area compared to the larger region.

	By Place of Work		By Place of Residence	
NAICS Title	LQ 2014 Waller- Texas	LQ 2014 Waller- US	LQ 2014 Waller- Texas	LQ 2014 Waller- US
Agriculture, Forestry, Fishing and Hunting	1.95	1.19	0.95	0.63
Mining	1.32	5.96	1.49	6.51
Utilities	0.38	0.45	0.99	1.17
Construction	1.59	2.09	1.36	1.79
Manufacturing	2.88	2.52	1.57	1.38
Wholesale Trade	1.52	1.78	1.33	1.55
Retail Trade	0.7	0.7	0.98	0.97
Transportation and Warehousing	0.78	0.85	0.8	0.88
Information	0.1	0.08	0.62	0.52
Finance and Insurance	0.19	0.2	0.62	0.64
Real Estate and Rental and Leasing	0.71	0.82	0.99	1.14
Professional, Scientific, and Technical Services	0.41	0.39	0.96	0.93
Management of Companies and Enterprises	0.03	0.02	0.96	0.59
Administrative and Support and Waste Mgmt	0.4	0.43	0.85	0.9
Educational Services	1.79	1.97	1.02	1.13
Health Care and Social Assistance	0.6	0.53	0.79	0.71
Arts, Entertainment, and Recreation	1.09	0.77	0.98	0.7
Accommodation and Food Services	0.64	0.64	0.82	0.83
Other Services(except Public Administration)	0.5	0.44	0.84	0.73
Public Administration	0.46	0.34	0.92	0.67

Table H.2. 1: Location Quotient by NAICS Industry Codes

Source: U.S. Census Bureau, On the Map Application and LEHD Origin-Destination Employment

Conversely, a value less than 1.0 demonstrates a weakness in the industry sector. The LQ was calculated by dividing the percentage of economic activity in Waller County by the percentage of economic activity of Texas.

Employment by 'place of work' demonstrates the jobs that are available in the county. Alternatively, employment by 'place of residence' indicates the types of jobs residents have, although the jobs are in another county.

Manufacturing boasts the greatest LQ at 2.88 when compared to Texas. Agriculture et al. follows behind at 1.95 and 1.19 when compared to the Texas and the US respectively. Not surprisingly, Education Services has a LQ of 1.79 due to influence of Prairie A&M. Mining is relatively large when compared to the US at 5.96 but not as large when compared to the Mining specialized in Texas. Nonetheless, Waller County has a higher proportion of Mining Jobs than Texas. Other industries Waller specializes in include Construction (1.59) and Wholesale Trade (1.52). All told, Waller County has many specializations pointing to a strong economy.

Of the industrial sectors with an LQ less than one, the most notable industry is Management of Companies and Enterprises (0.03). Most likely, these types of jobs are hosted by nearby Houston, often dubbed the oil capitol of the US. Along with corporate jobs in mining, Houston likely attracts most if not all of the white-collar jobs. Other sectors including Information

(0.10) and Finance and Insurance (0.19) are also likely to be stronger Houston.

3. Economic Growth

Waller County has benefited from the overall growth in Texas. Shift-share analysis is a tool which complements LQ and economic base analysis. The purpose is to indicate the relative economic growth rate of the region's industries compared to national trends and to determine regional comparative advantages. It determines how much of regional job growth can be attributed to national trends compared to local economic conditions.

In Waller County, employment levels compare exceptionally well to state and national benchmarks. Total employment 'by place of residence' increased by 4,092 or 39.96% from 2004 to 2014. Comparatively, Texas increased by 2, 27,109 or 25.14% and the U.S. increased by 15,319,082 or 12.80%.

The energy and chemical industries appear to be emerging and dominant in Waller County (Figure H.3.2). Manufacturing was concentrated in the County as well, in comparison to the nation. Additionally, manufacturing is export-oriented with a base multiplier value of 2.17. From 2004 to 2014, Waller experienced a slight reduction in the proportion of workers that live and work in Waller County. Nearby Harris County, anchored by Houston, attracts a majority of the employment leaving the county. Figure H.4.3 depicts employment flow from Waller County for 2004 and 2014

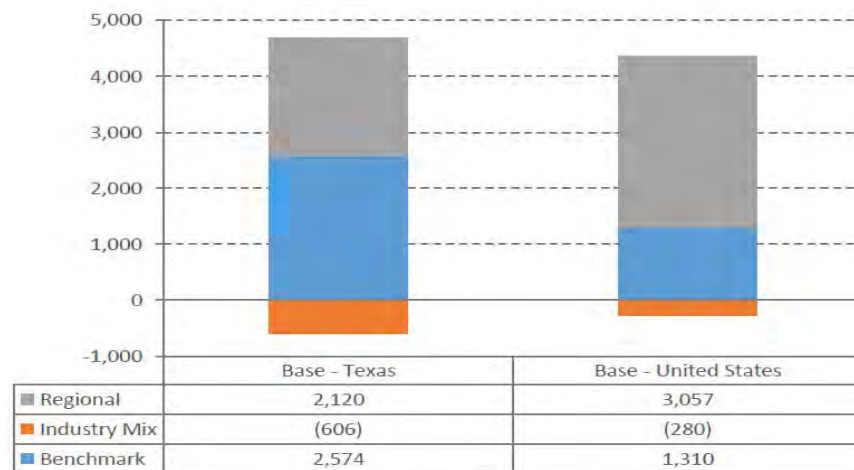


Figure H.3.1: Shift-Share Analysis for Waller County, 2004-2014

Source: U.S. Census Bureau, On the Map Application and LEHD Origin-Destination Employment

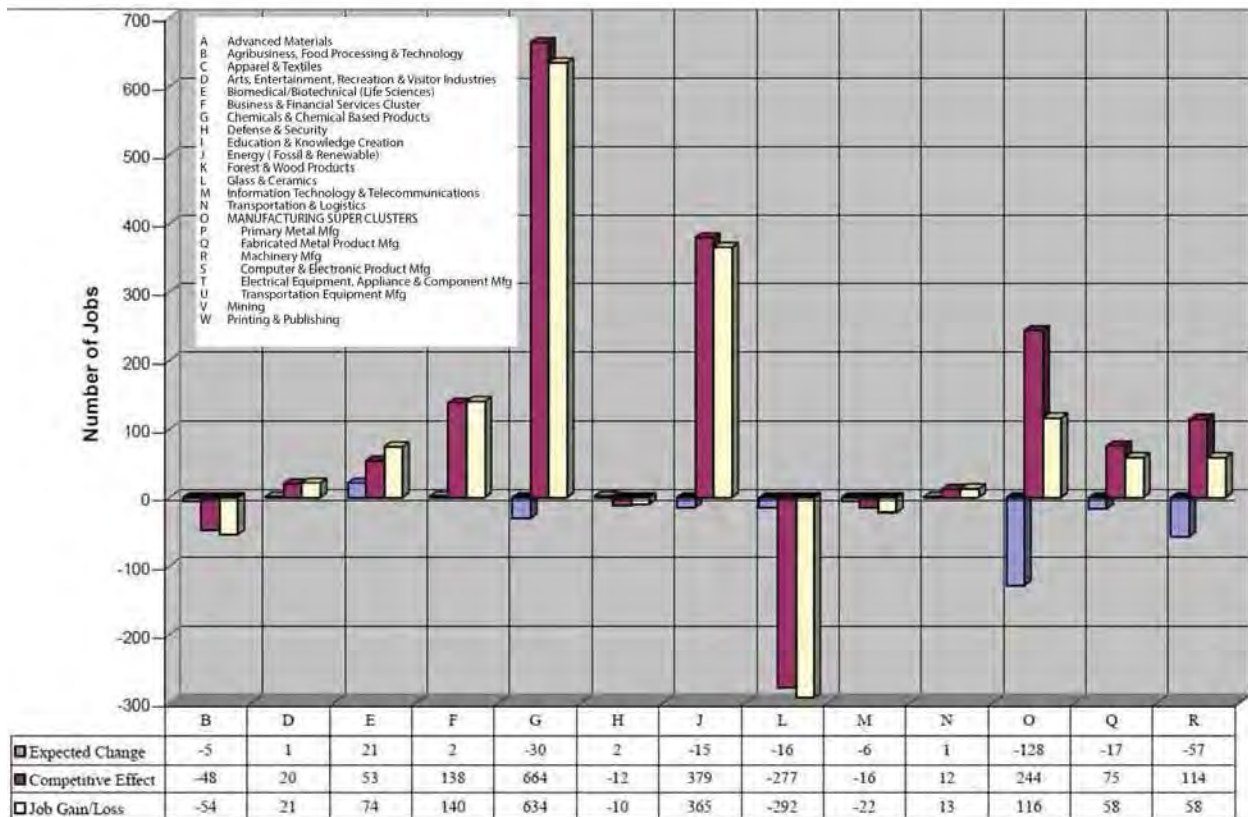


Figure H.3.2: Shift- Share Analysis of Waller County Industry Clusters as Compared to Texas

Source: https://www.h-gac.com/community/community/publications/regional_industry_cluster_analysis.pdf

The categories in Table H.3.1 are defined using five variables that measure economic change. Economic performance in Waller and surrounding counties is measured with indicators, such as median household income, average annual wage, unemployment rate, and poverty rate. Median household income, which includes transfer payments, wages and investment income, measures the economic well-being of a household. Average annual wage on the other hand, indicates compensation levels. The unemployment rate is utilized to assess labor availability information; whereas, poverty rate quantifies the proportion of the population whose family income is below a certain threshold. In addition to the four variables mentioned above, five other indicators are used to measure the economic well-being of a county: average annual change since 2001 for the four indicators mentioned above, plus change in total covered employment from 2001 to 2005. The economic performance analysis indicates that most of the counties in the

region with the exception of Matagorda County are performing well. The County should use these indicators to monitor improvements overtime.

4. Job Density and Inflow/ Outflow

Employment sectors were concentrated in the six cities (Prairie View, Pine Island, Hempstead, Waller, Brookshire and a part of Katy). While the discussion thus far has focused on the jobs available inside Waller County, it is also important to understand the inflow and outflow of employees. In addition, there are three categories of employees

- 1) Live and work in Waller.
- 2) Live in Waller and work outside of Waller.
- 3) Live outside of Waller and commute to Waller to work.

	Downward	Stable	Upward
Poor			
Medium	Matagorda	Liberty, Waller, Wharton	Colorado, Walker
Good		Austin, Brazoria, Chambers, Galveston, Harris, Montgomery	Fort Bend

Table H.3.1: Distribution of GCEDD Counties across Nine Types of Economic Performance

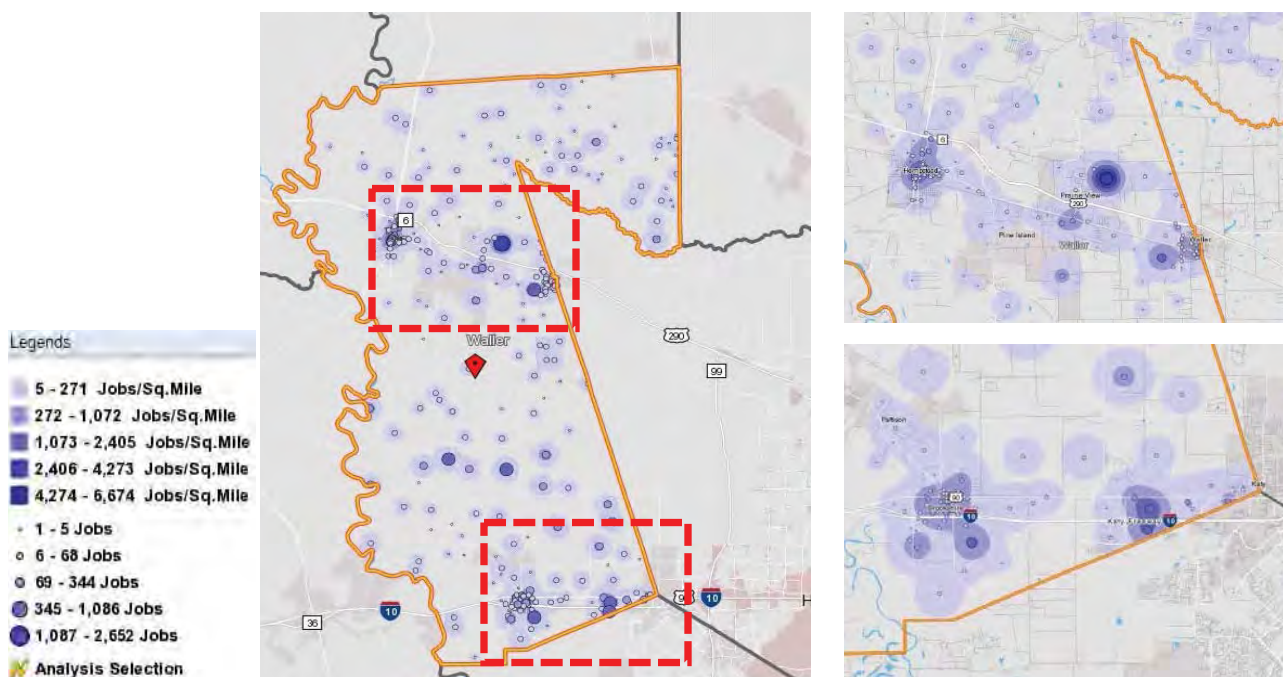
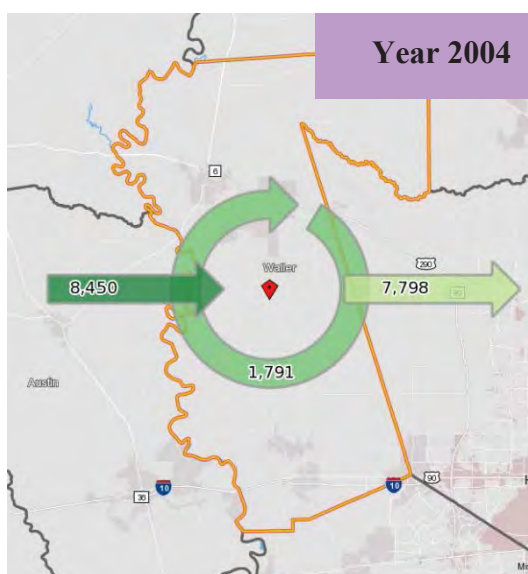


Figure H.4.1: Major Employment provision areas in Waller County

Source: <http://onthemap.ces.census.gov/>



Source: U.S. Census Bureau, on the Map Application and LEHD Origin-Destination Employment Statistics

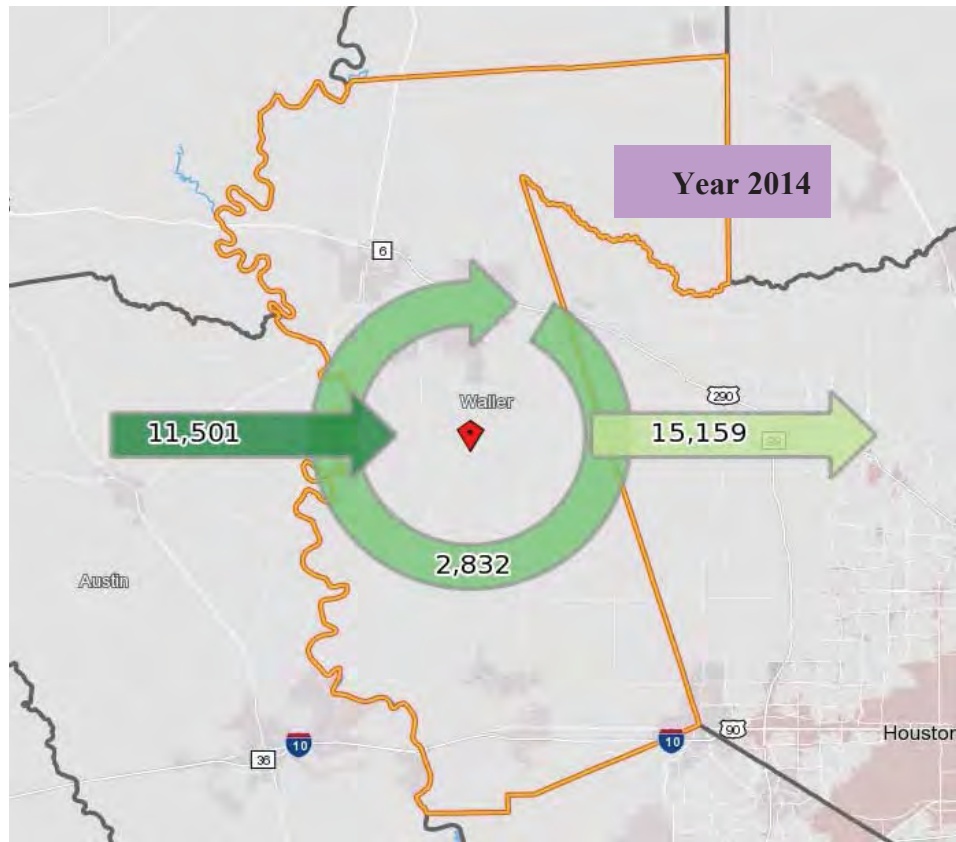
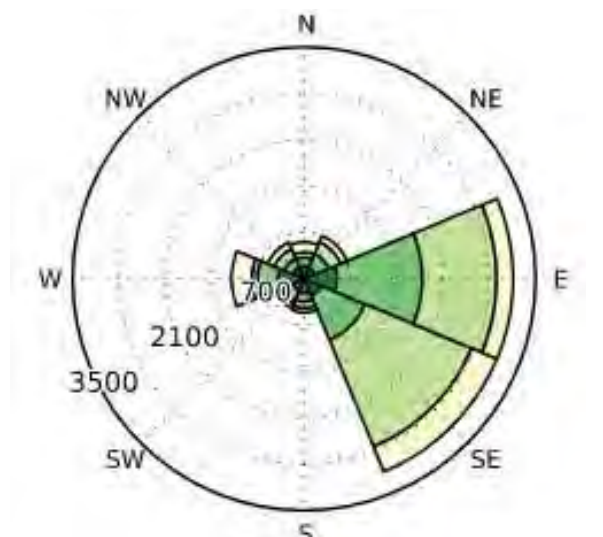


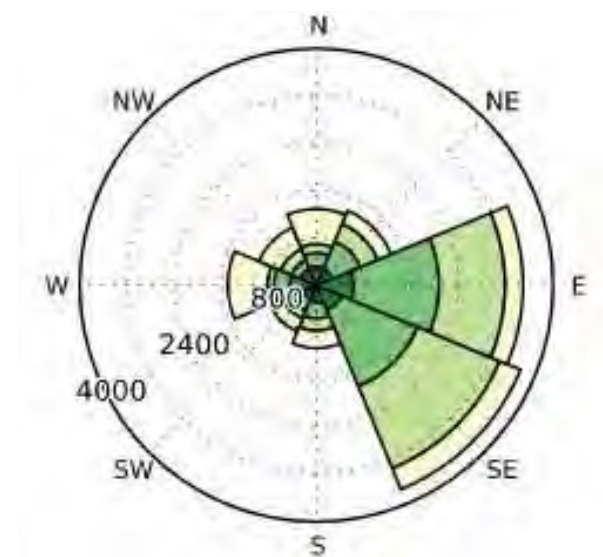
Figure H.4.2: Job Inflow/ Outflow

Source: U.S. Census Bureau, On the Map Application and LEHD Origin-Destination Employment Statistics



Year 2004

Jobs by Distance - Work Census Block to Home Census Block		
	2004	
	Count	Share
Total All Jobs	10,241	100.0%
Less than 10 miles	2,111	20.6%
10 to 24 miles	3,160	30.9%
25 to 50 miles	3,518	34.4%
Greater than 50 miles	1,452	14.2%



Year 2014

Jobs by Distance - Work Census Block to Home Census Block		
	2014	
	Count	Share
Total All Jobs	14,333	100.0%
Less than 10 miles	3,002	20.9%
10 to 24 miles	4,483	31.3%
25 to 50 miles	3,740	26.1%
Greater than 50 miles	3,108	21.7%

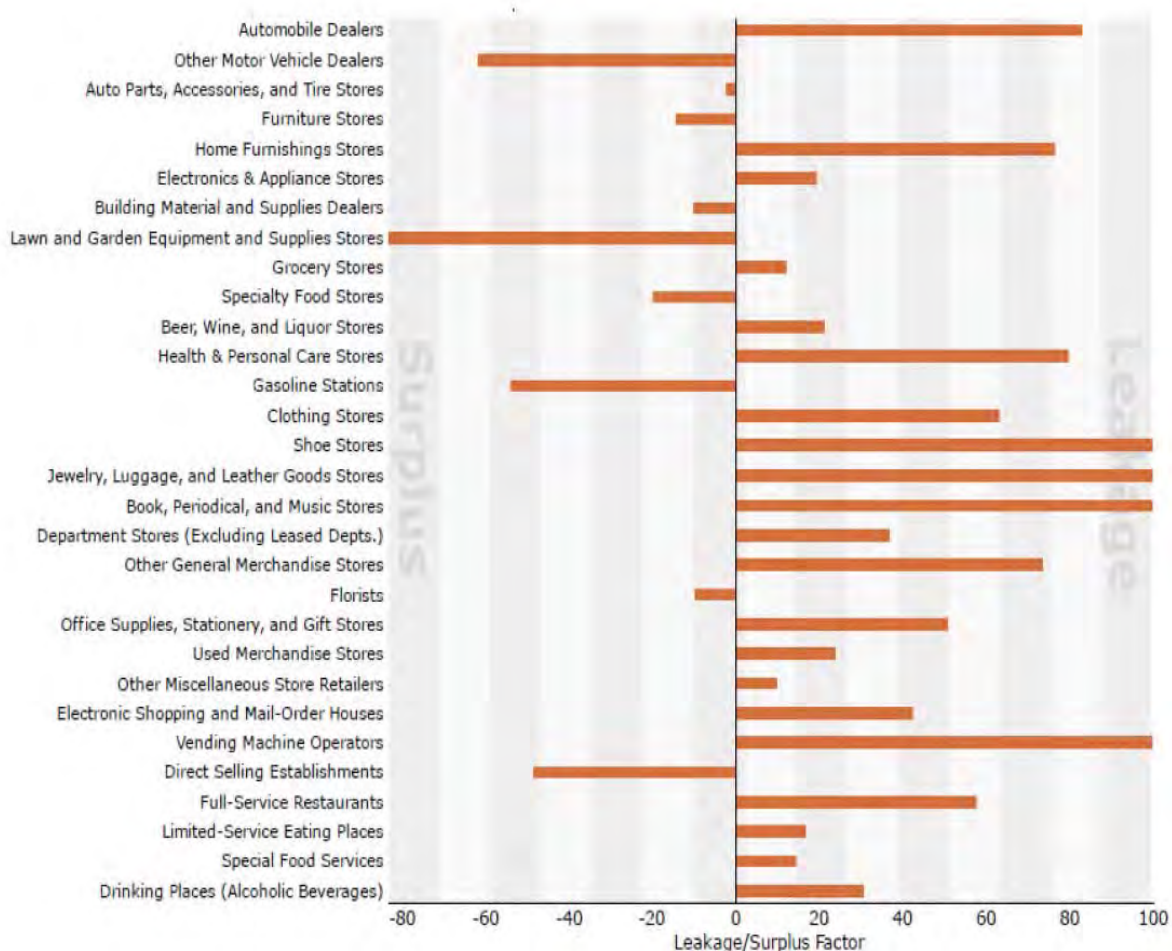
Figure H.4.3: Distance and Direction from Home Census Block to Work Census Block

Source: U.S. Census Bureau, On the Map Application and LEHD Origin-Destination Employment Statistics

5. Leakage/ Surplus Factor

A leakage represents an industry sector where the volume of local retail sales generated by local retail businesses do not meet the volume of retail potential of local household spending – essentially, when demand exceeds supply. A leakage presents an opportunity to keep household spending within the county rather than lose it to markets outside of Waller County. A surplus on the other hand represents a situation where supply exceeds local demand, but it is possible that the excess supply is attracting consumption from outside the Waller market area.

From Figure H.5.1 we can see that vending machine operators, shoe and accessory stores and stationary stores fall under leakages. Vending machines are very common and important, especially at places like bus stops, school canteens, office canteens, community halls, stadiums, gas stations etc. There are very few sectors which are surplus in the County. Also, we understand that the County primarily depends on the neighboring cities like Houston for jobs, entertainment and shopping centers.



6. Income Distribution

The per capita income of Waller County is \$34,078 (BEA 2014) and median household income is \$50,889. The distribution of median income of the county shows that the Katy area has the highest median income and the Pattison area has the lowest (Figure H.6.2). In Waller County 29.07% of the African-American population lives below

poverty line, followed by 22.76% of the Hispanic population and 21.22% of the White or Anglo population.

On an average, White citizens earn more than other races or ethnicities. Figure H.6.1 shows the wage disparity between the 5 most common occupations.

Highest Average Salary: White; \$43,572 ± \$3,317

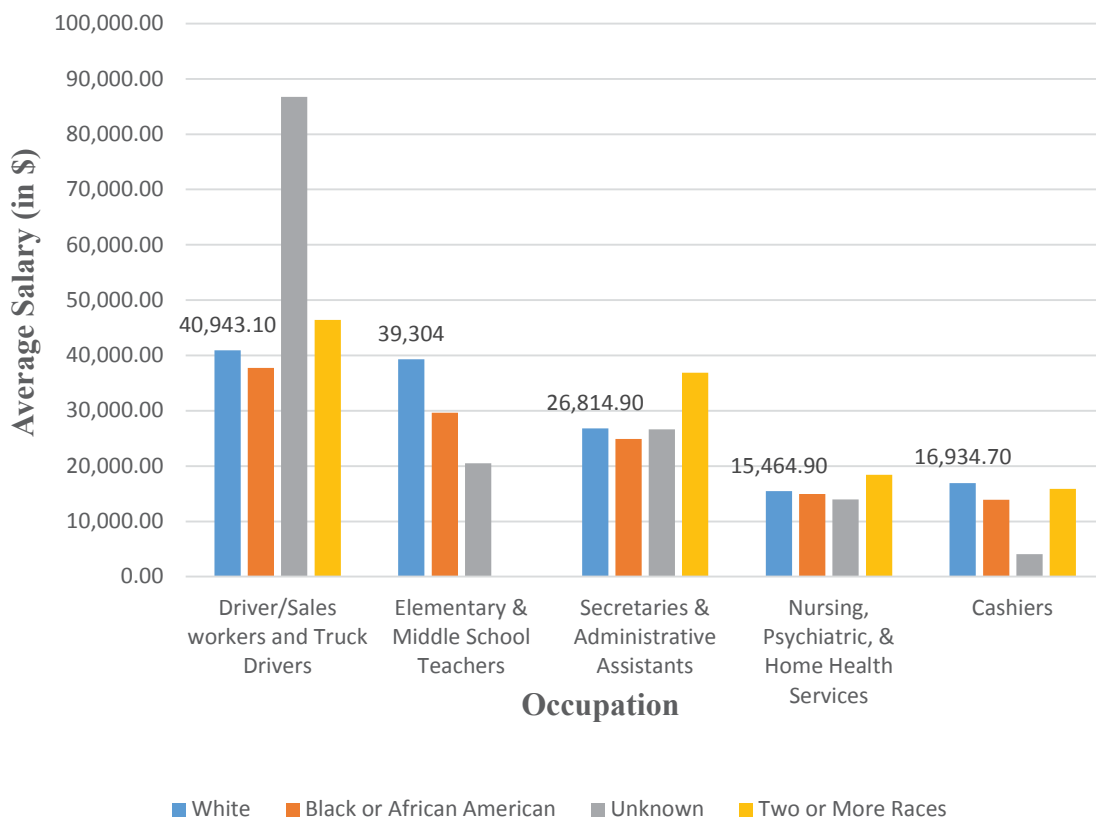


Figure H.6.1: Wage by Race & Ethnicity

Median Income Distribution in Waller County

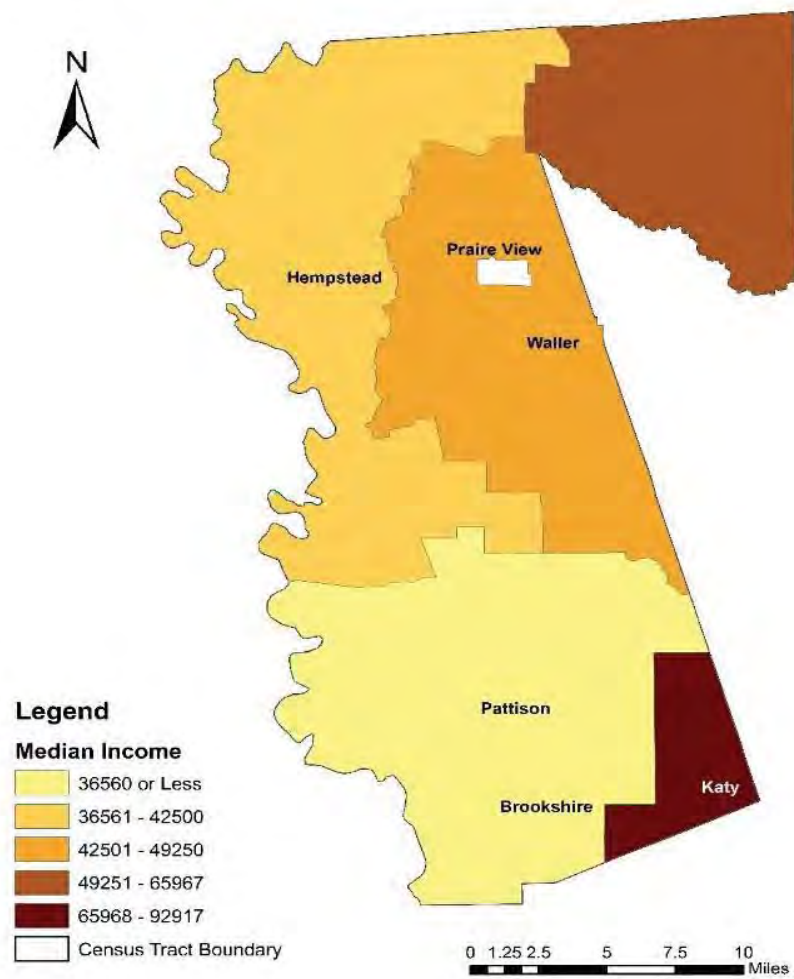


Figure H.6.2: Distribution of Median Income

Source: U.S. Census Bureau 2014

7. Poverty

Roughly 19% of the population in the US live below the poverty level, which is a little more than Texas (17%). In Waller County, Prairie View has the highest percentage of

people living below poverty. This may be due to the high student population (Figure H.7.1). According to the US Census Bureau (see Figure H.7.2), 36% of the population are in poverty and not in the labor force.

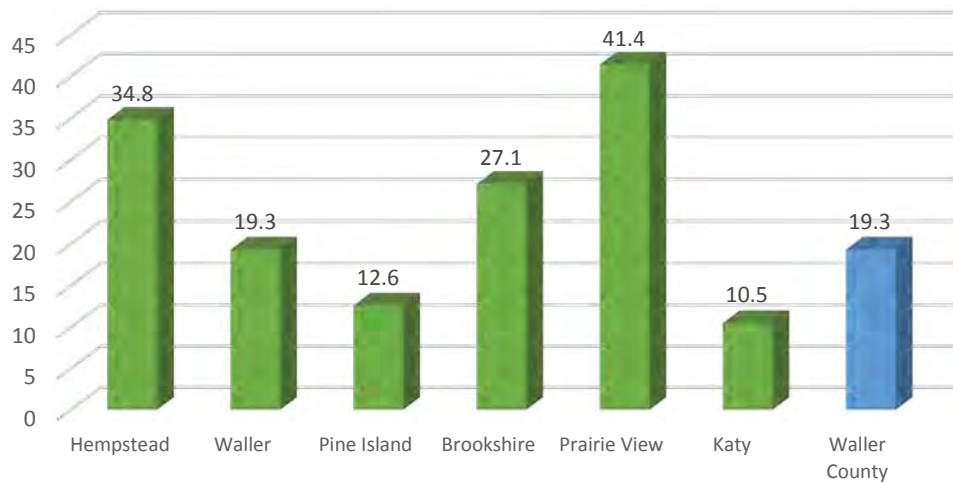


Figure H.7.1: Population in Poverty (%)

Source: U.S. Census Bureau 2014

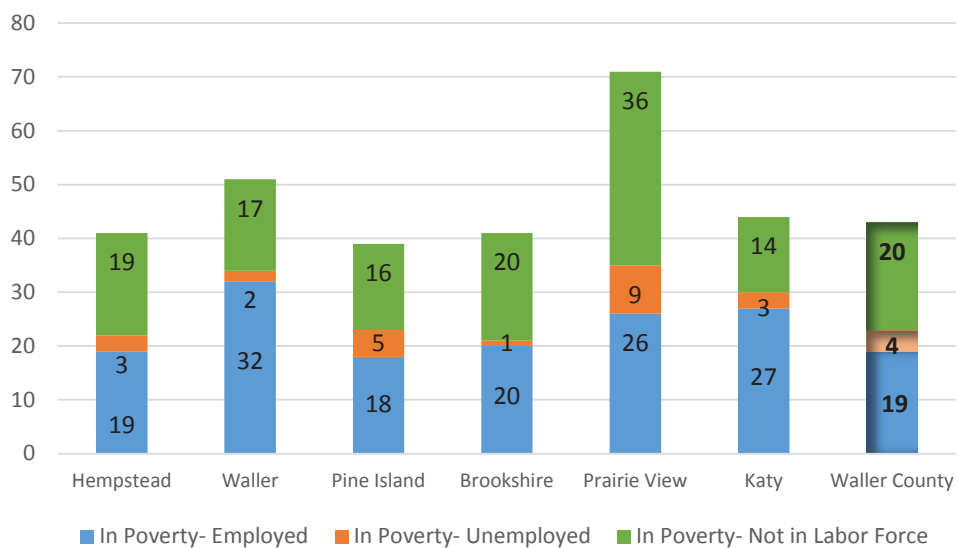


Figure H.7.2: Population in Poverty and Working Status (%)

Source: U.S. Census Bureau 2014

I. Housing

1. Housing Types

The majority of the homes in Waller County are single family, multi-family, and mobile homes. There are 15,839 total housing units with an average household size of 2.81 and family size of 3.29. By 2035, 10,000 additional housing units are needed to meet population projections referenced earlier in this document. Roughly, 9,482 are owner occupied units and just over half (51.5%) of the owner occupied units carry mortgage.

Waller County has a larger percentage of mobile homes than Texas. The County has

24% of housing stock as mobile homes which is common in rural areas (Figure I.1.1).

2. Rentals vs. Owners

Texas has 35% rental and 65% owned homes. Overall, Waller County is similar to Texas, though city by city we see a different picture (Figure I.2.1). A higher percentage of rental homes in Prairie View is likely due to the presence of Prairie View A&M. Pine Island and Katy have the high share of owned homes in the county (Figure I.2.1). The overall number of rental units are in Table I.2.2.

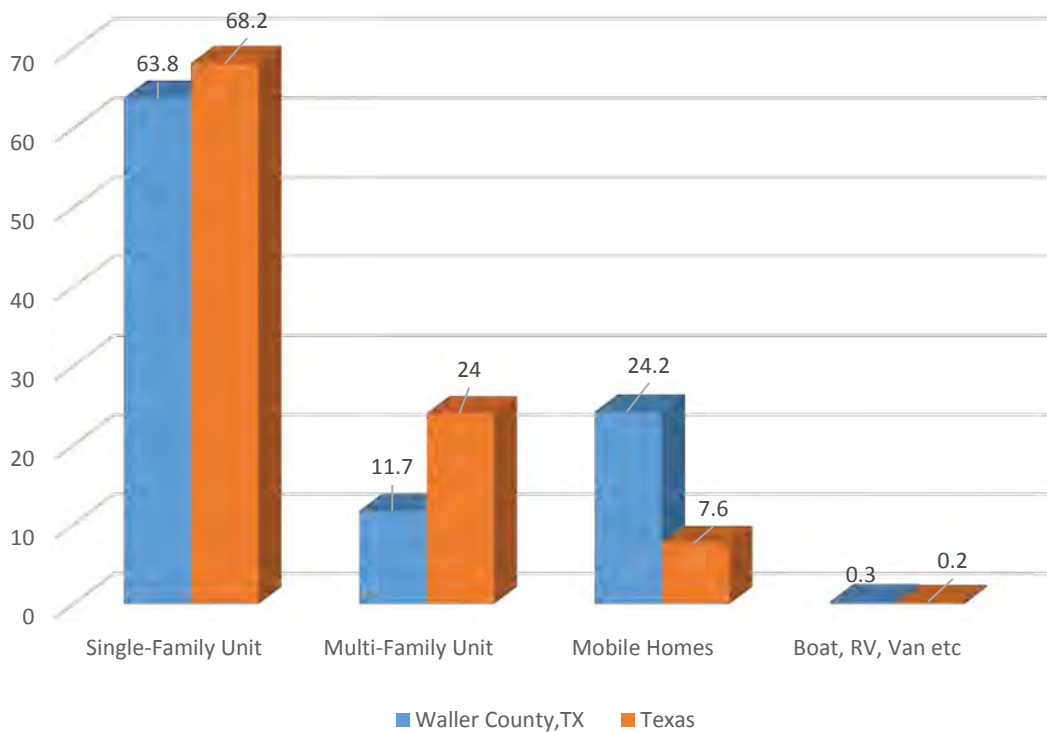


Figure I.1.1: Comparison of Housing Type (%)

Source: Our Great Region 2040: H-GAC

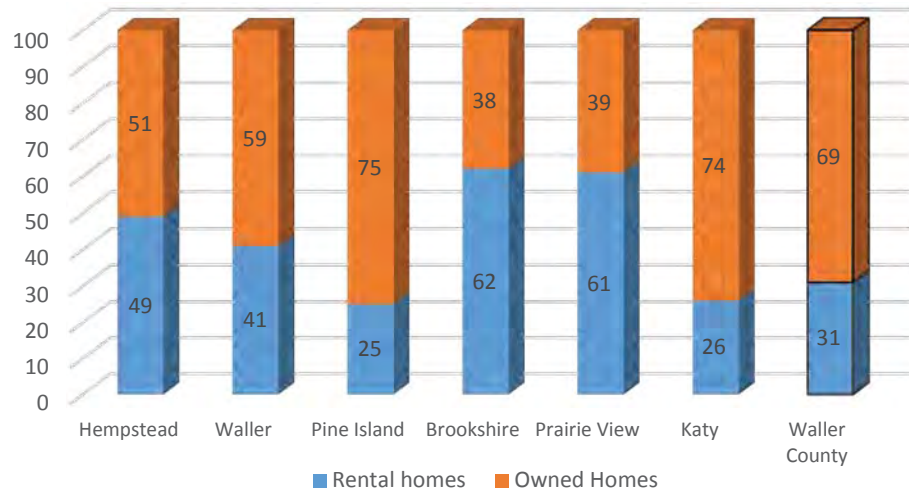


Figure I.2.1: Percentage of Owned and Rental Homes

Source: U.S. Census Bureau 2014

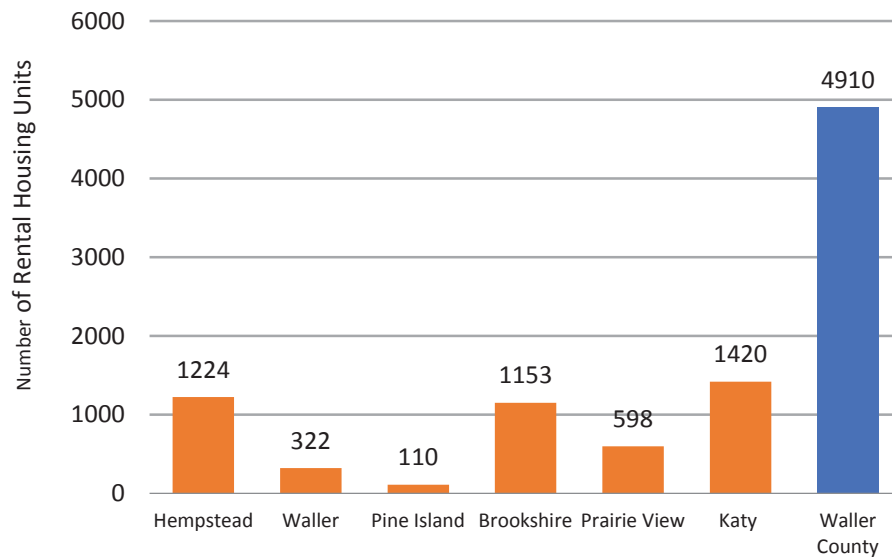


Figure H.2.2: Number of Rental Housing Units

Source: U.S. Census Bureau 2014

3. Home Value

About 18% of the homes in Waller County are worth less than \$50,000 (Figure 9.3.1). It also has one of the largest proportions of home values between \$50,000 and \$100,000 or 21% of all homes (Harris County -

25%, Grimes County - 27%). Roughly 40% of all homes are less than \$100,000 in value and 70% of all homes are less than \$200,000 in value. Figure 9.3.2 offers a closer at the individual cities, Brookshire and Hempstead have a large proportion of homes valued less than \$50,000, 45% and 40% respectively.

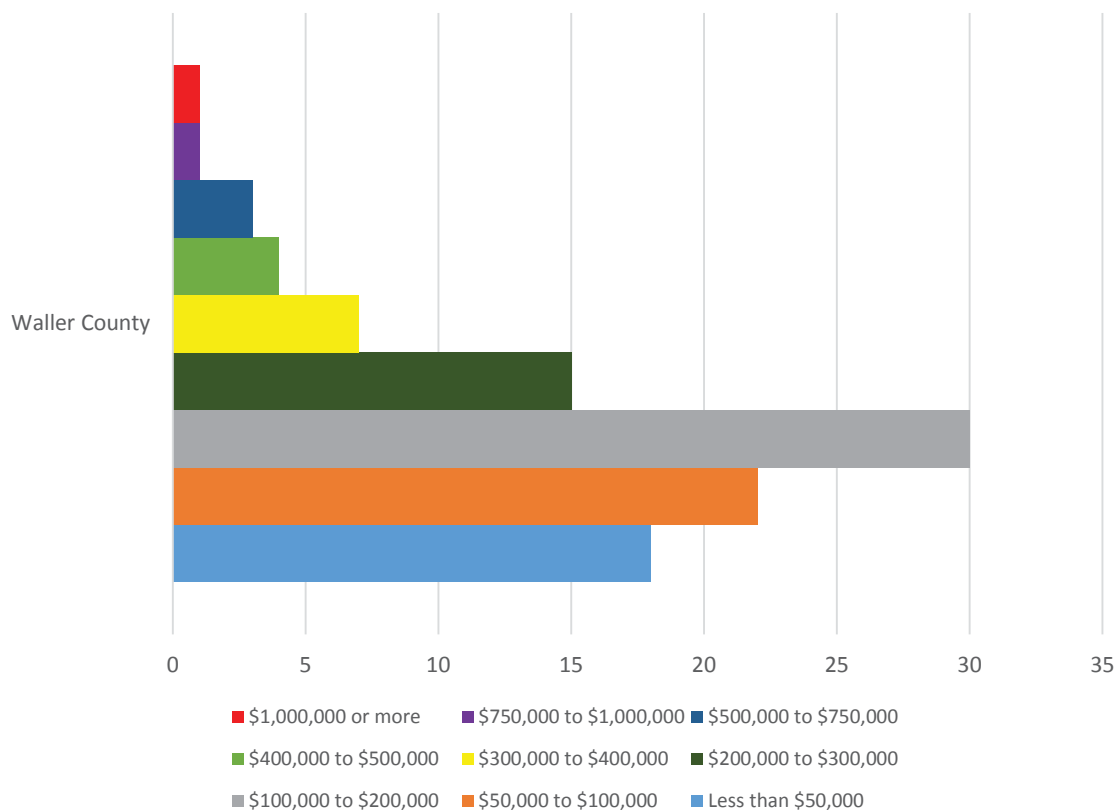


Figure I.3.1: Home Value Distribution (%)

Source: U.S. Census Bureau 2014

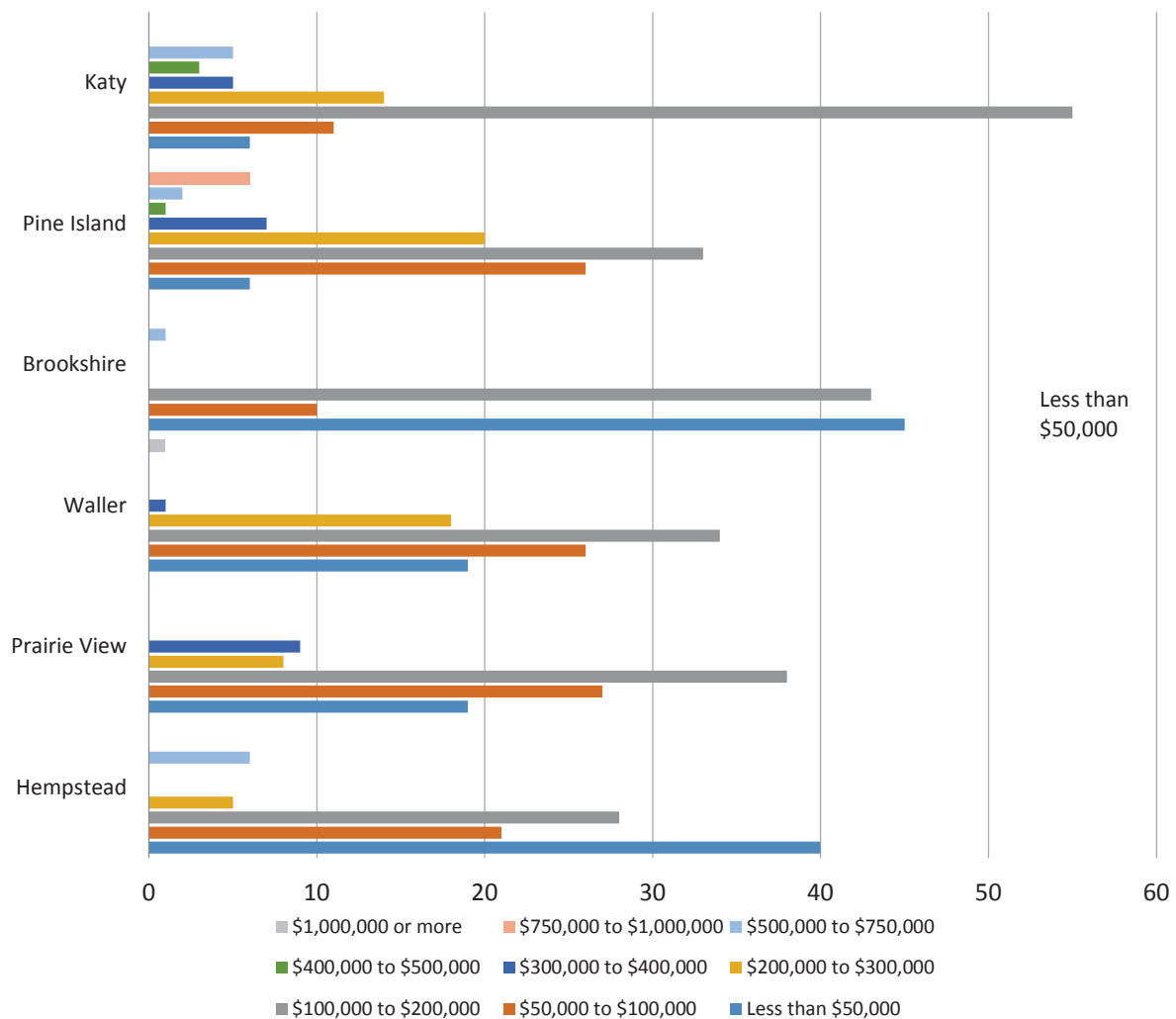


Figure I.3.2: Home Value Distribution (%) by City

Source: U.S. Census Bureau 2014

4. Monthly Rental Rates

With regard to rental rates, most (33%) pay between \$500 and \$750 in Waller County

(see Figure I.4.2). Prairie View has a good mix rent levels, and inn Hempstead, most rental housing is less than \$1000 in rent.

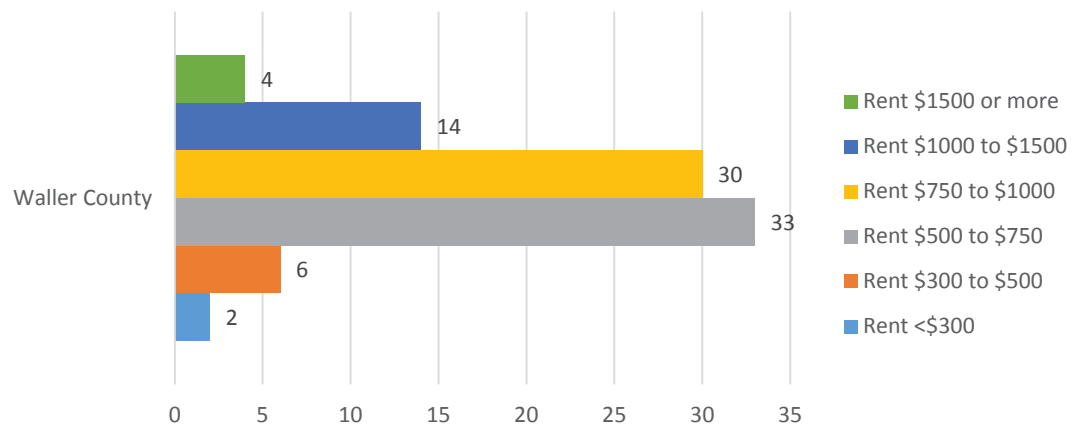


Figure I.4.1: Monthly Rental rates for the County (%)

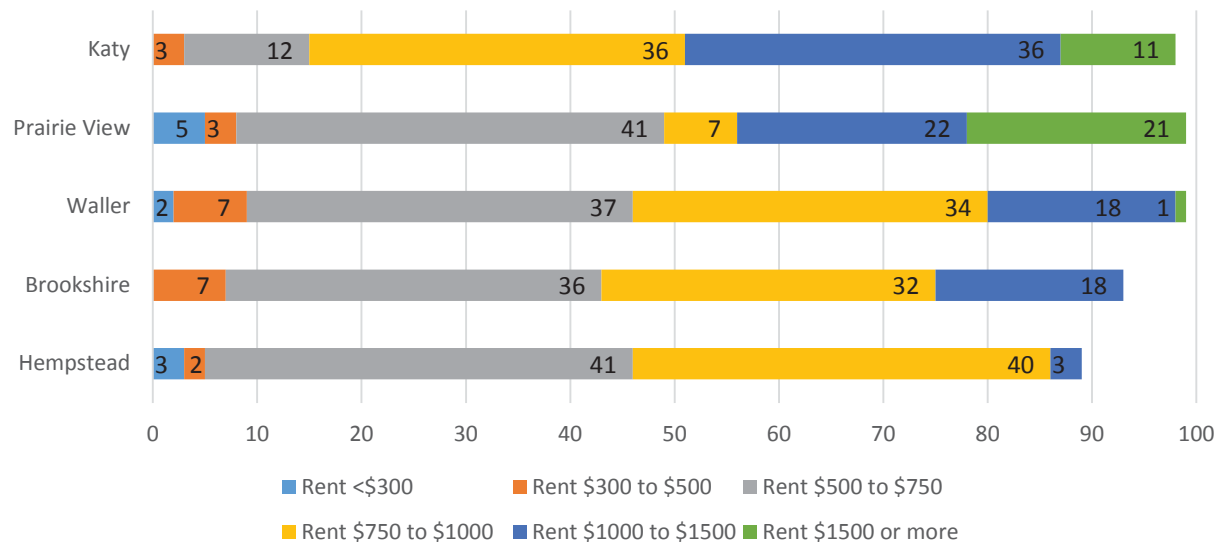


Figure I.4.2: Monthly Rental Rates Cities (%)

Source: <http://www.towncharts.com/Texas/Housing/Waller-County-TX-Housing-data.html>, U.S. Census Bureau

J. Housing Vacancy & Unaffordability

1. Vacant Housing

Vacant and abandoned properties are often attributed to larger economic forces at work

in the community; and they often associated or at least perceived to be associated with higher levels of crime, increased risk to health and welfare, plunging property values, and escalating municipal costs, which exacerbates overall community decline and

disinvestment. Out of the total housing units (15,839), roughly 11.5% are vacant. Of

vacant units, 2.77% are for rent and 1.29% are for sale (Figure J.1.2).

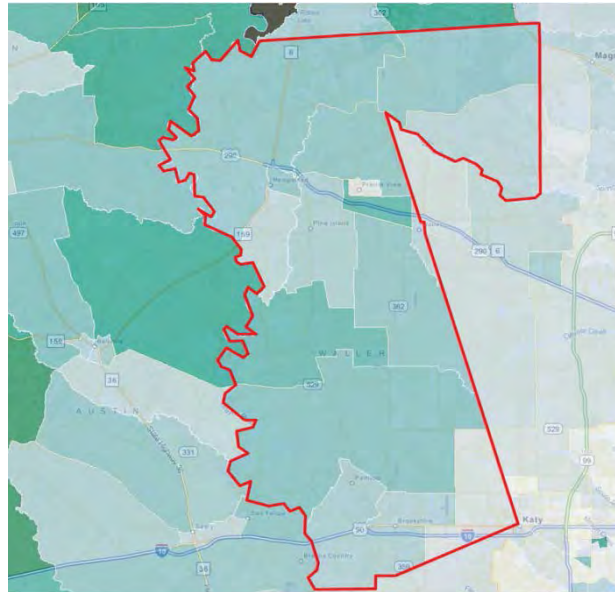


Figure J.1. 1: Vacant Housing Units (%)

Source: <http://www.city-data.com/county/Waller> County-

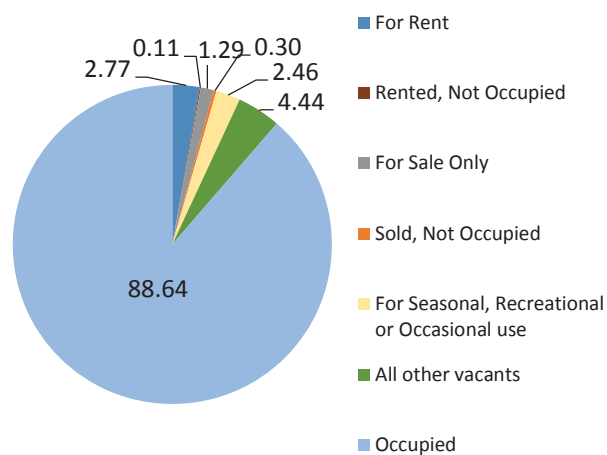


Figure J.1.2: Housing Availability (%)

Source: ASC, 2014

2. Mortgage Status and Affordability

Roughly 51% of housing units in Waller County have a mortgage payment (Texas: 61%). As Figure J.2.1 indicates, Pine Island has comparatively fewer housing units with a mortgage payment (at 30% of houses). In addition, there are 60 units in Hempstead (13.2%) and 9 (11.1%) units in Pine Island that pay more than \$3,000 or more as a mortgage payment. Most of the units in Hempstead and the City of Waller pay a mortgage of over \$1,000.

Housing units without a mortgage payment typically pay a minimum amount for maintenance purposes even after the

mortgage has been paid off and are 'free and clear'. The cities of Hempstead, Waller, Pine Island and Prairie View have more than 50% of homes without a mortgage payment (Table J.2.2.2).

There are 822 units in the County (59 in the City of Waller, 31 in Pine Island, and the remaining in unincorporated areas of the county), paying \$700 or more even without a mortgage. These data can be used in the development of housing programs aimed to meet the needs of people at different economic levels.



	Texas	Waller County	Brookshire	Hempstead	Pine Island	Prairie View	Waller city	Katy
Total (Owner Occupied Units)	5,652,542	9,482	601	1,014	273	291	405	3,915
Housing units with a mortgage:	3,423,338	4,882	406	452	81	139	166	2,530
Less than \$200	1,212	0	0	0	0	0	0	0
\$200 to \$299	3,843	6	0	0	0	0	0	6
\$300 to \$399	10,835	0	0	0	0	0	0	0
\$400 to \$499	29,536	33	0	0	0	0	0	0
\$500 to \$599	57,921	69	23	25	0	20	0	0
\$600 to \$699	95,797	140	42	0	0	0	0	16
\$700 to \$799	133,467	192	18	57	0	13	13	0
\$800 to \$899	171,467	222	0	41	0	0	0	49
\$900 to \$999	198,129	155	31	0	1	0	0	122
\$1,000 to \$1,249	578,005	937	171	129	30	30	65	393
\$1,250 to \$1,499	558,475	844	24	120	12	31	68	550
\$1,500 to \$1,999	771,459	1,147	55	20	11	45	15	709
\$2,000 to \$2,499	373,440	503	42	0	8	0	5	348
\$2,500 to \$2,999	189,801	357	0	0	10	0	0	82
\$3,000 or more	249,951	277	0	60	9	0	0	255

Table J.2.1: Selected Monthly Home Owner Cost - Housing Units with Mortgage

Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates

	Texas	Waller County	Brookshire	Hempstead	Pine Island	Prairie View	Waller city	Katy
Total (Owner Occupied Units)	5,652,542	9,482	601	1,014	273	291	405	3,915
Housing units without a mortgage:	2,229,204	4,600	195	562	192	152	239	1,385
Less than \$100	23,734	13	0	0	0	0	0	0
\$100 to \$149	51,478	9	0	0	2	0	0	8
\$150 to \$199	102,411	141	0	15	0	0	0	8
\$200 to \$249	149,251	263	0	49	3	0	32	68
\$250 to \$299	180,968	424	0	70	20	18	9	43
\$300 to \$349	197,016	479	0	125	6	9	32	25
\$350 to \$399	199,842	484	62	99	14	0	17	38
\$400 to \$499	360,308	756	104	57	43	55	62	188
\$500 to \$599	285,788	675	8	116	43	27	23	196
\$600 to \$699	206,468	534	21	31	30	24	5	212
\$700 or more	471,940	822	0	0	31	19	59	599

Table J.2 2: Selected Monthly Home Owner Cost - Housing Units without Mortgage

Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates

3. Monthly Rental Rates

There are 44% of studio apartments available for rent in the County, although none are available in the City of Waller, Pine Island and Katy. In Prairie View all the studio apartments are \$1000 or more. Additionally, 45% of apartments in Hempstead and Waller

County overall are on 'rent without any cash'.

As for one-bedroom rental units, most range from \$500-\$749 per month but Katy has majority of units costing more than \$750 per month.

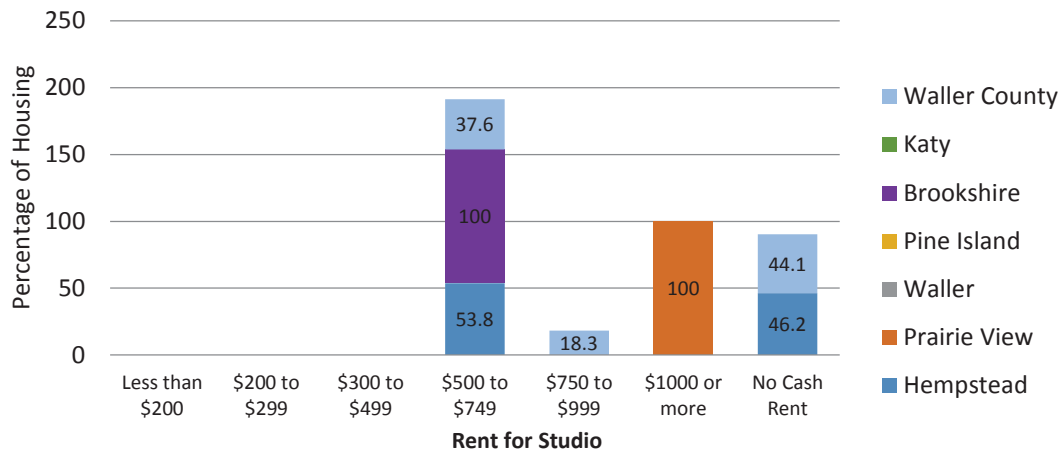


Figure J.3. 1: Rental Characteristics for Studio - No Bedroom Units

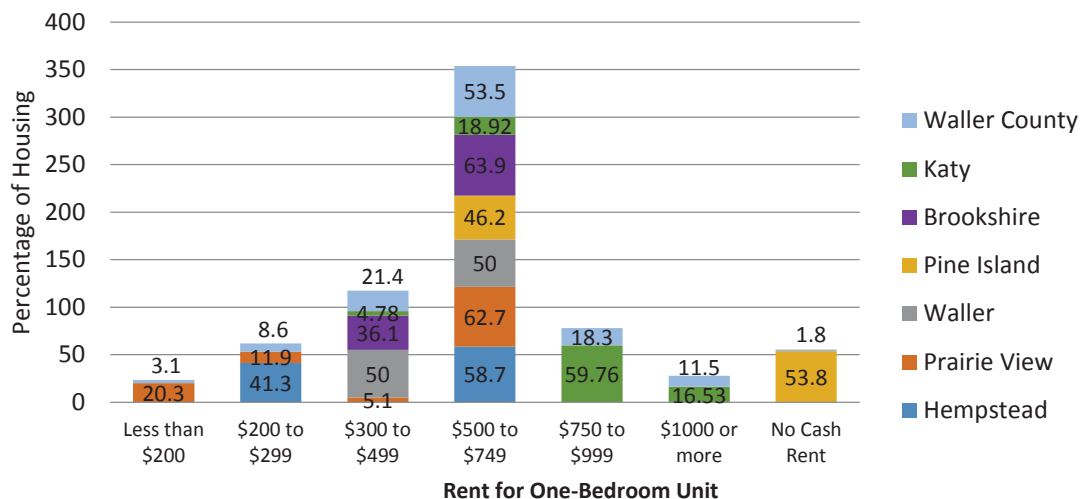


Figure J.3.2: Rental Characteristics for One-Bedroom Units

Two bedroom apartments are available in most of the cities in all price ranges, though

the County average ranges from \$500-\$1000 (Figure J.3.3).

About 82% of rental properties in Prairie View and 70% in Katy are more than \$1,000 per month for a three bedroom unit.

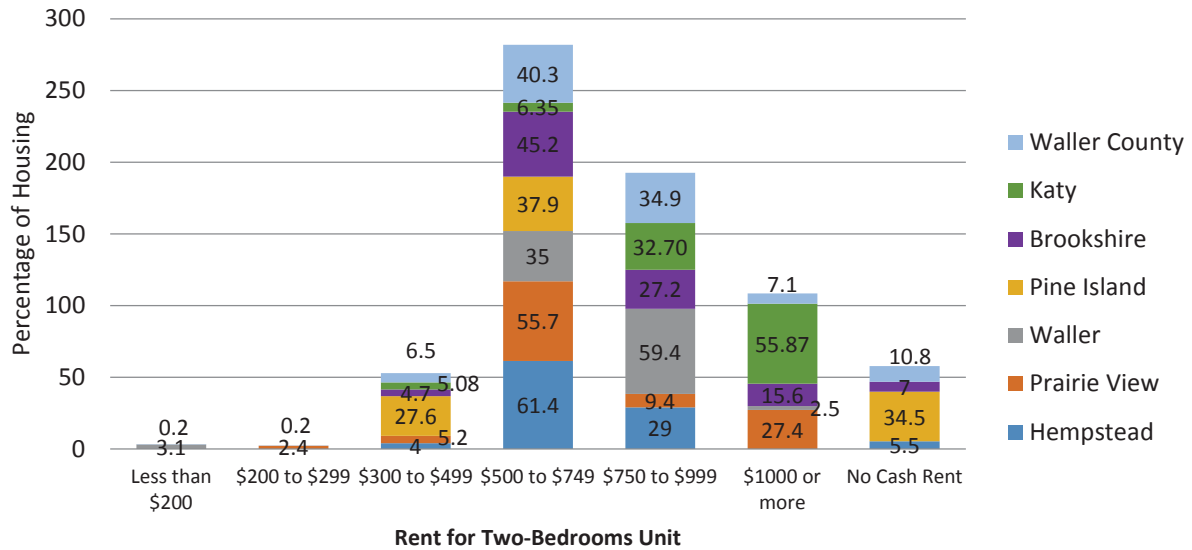


Figure J.3.3: Rental Characteristics for Two-Bedroom Units

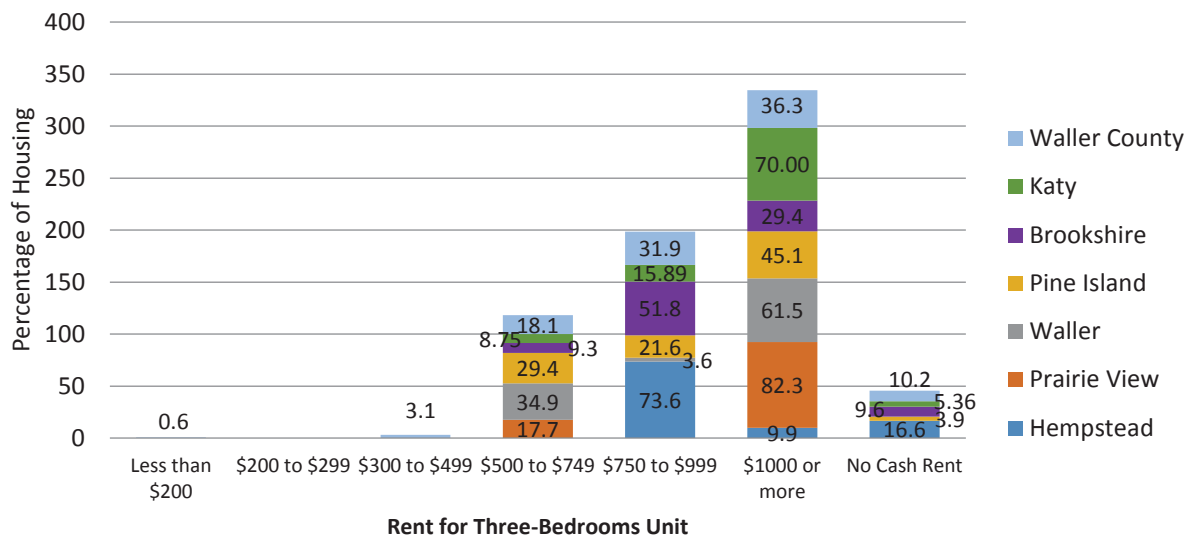


Figure J.3.4: Rental Characteristics for Three-Bedroom Units

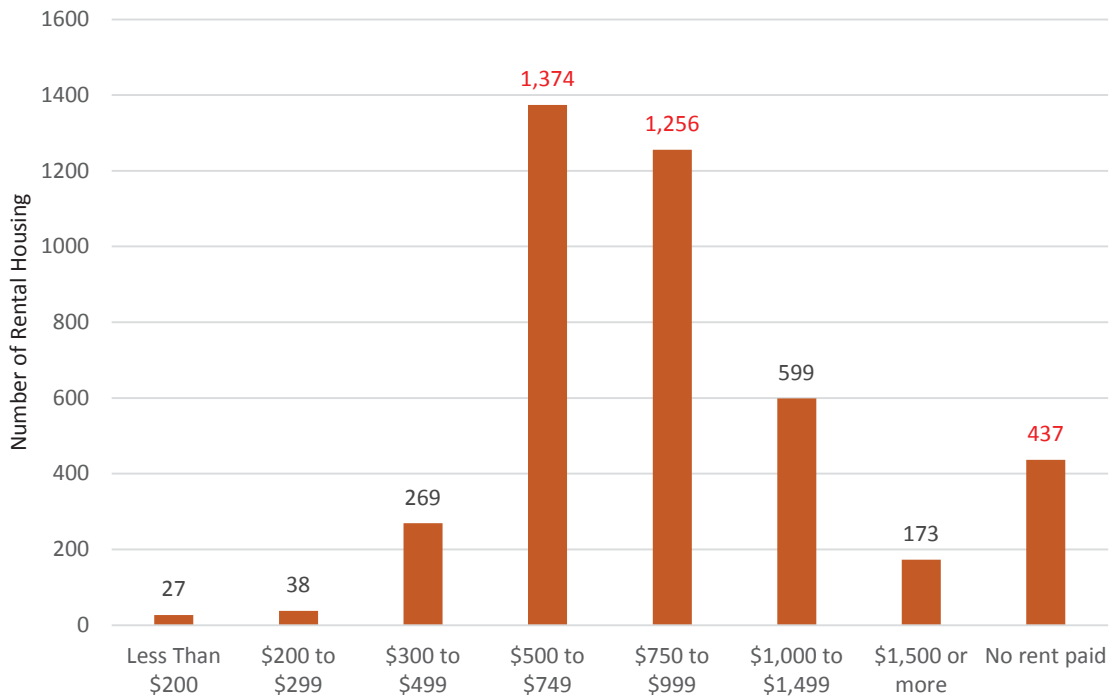


Figure J.3.5: Number of Rental Housing Units by Price in Waller County

The Figure J.3.5 above indicates the number of rental housing units at various price ranges in Waller County. Most of the rental units fall within the \$500 – \$900 range. There around 440 units which take no rent from renters.

4. Affordable Housing Programs

Waller County’s federally assisted affordable rental housing stock includes 16 properties

and 754 units financed through Section 8, LIHTC and RD 515. Units provide some form of rental assistance to make them more affordable for very low income population. The largest federally assisted affordable rental community in the county is the Park at Clear Creek (76 units) while the smallest is Donald Sowell (1 unit). Two apartment properties provide senior housing totaling 90 units.

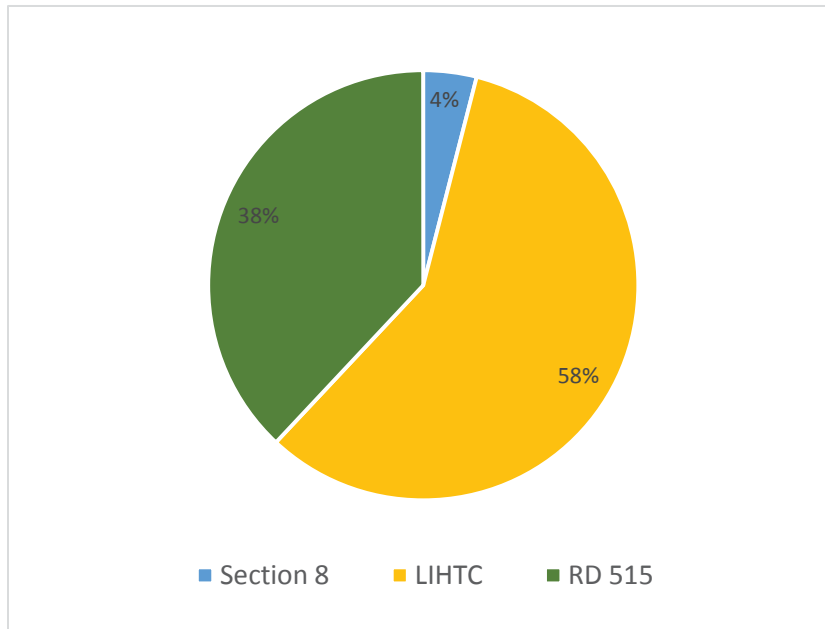


Figure J.4. 1: % of Federally Assisted Affordable Housing in Waller County

Cities with Federally Assisted Projects in Waller County

City	Properties	Units
Hempstead	7	399
Prairie View	5	133
Brookshire	2	92
Program	Properties	Units
Section 8	1	44
LIHTC	13	641
RD 515	9	415
Total	16	754

Note: The total does not necessarily equal the sum of each program as some properties may participate in multiple funding programs

K. Environmental

1. Most Recent Natural Disasters

There have been a number of federally declared disasters since 1995 in Waller

County (13), six hurricanes, four fires, three floods, three storms, and two tornadoes (Table K.1.1). To date, Waller County has been granted about \$6,218,085.26 in FEMA Public Assistance.

Name	Incident Period	Emergency Declared	FEMA Id	Natural Disaster Type
Texas Hurricane Ike	September 7, 2008 – September 26, 2008	September 10, 2008	FEMA-EM-3294	Hurricane
Texas Hurricane Ike	September 7, 2008 – October 2, 2008	September 13, 2008	FEMA-DR-1791	Hurricane
Texas Hurricane Gustav	August 27, 2008 - September 7, 2008	August 29, 2008	FEMA-EM-3290	Hurricane
Texas Wildfires	March 14, 2008 - September 1, 2008,	March 14, 2008	FEMA-EM-3284	Fire
Texas Hurricane Rita	September 23, 2005 - October 14, 2005	September 24, 2005	FEMA-DR-1606	Hurricane
Texas Hurricane Rita	September 20, 2005 to October 14, 2005	September 21, 2005	FEMA-EM-3261	Hurricane
Texas Hurricane Katrina	August 29, 2005 to October 1, 2005	September 2, 2005	FEMA-EM-3216	Hurricane
Texas Extreme Fire Hazards	August 1, 1999 to December 10, 1999	September 1, 1999	FEMA-EM-3142	Fire
Texas Severe Storms, Flooding and Tornadoes	October 17, 1998 to November 15, 1998	October 21, 1998	FEMA-DR-1257	Storm, Tornado, Flood
Texas Fire Emergency	February 23, 1996 to September 19, 1996	February 23, 1996	FEMA-EM-3117	Fire

Table K.1. 1: History of Natural Disaster

2. Floods, Historical Tornadoes, and Watersheds

Most of Waller County has been affected by tornadoes of scale F0- F2 at some point in its history. The eastern side of the County is more prone to flooding due to the presence of the Brazos River.

Watershed planning is a common practice for flood mitigation and ecological sustainability. If we look at the county by

watershed, eastern Waller County (in purple) drains towards Houston and western Waller County (in white) drains toward the Brazos River (Figure K.2.2). Development and increased impervious surfaces in the County will likely impact drainage and flooding in the Houston area. Eastern Waller County development will impact the Addicks Reservoir, while western Waller County development will impact communities along the Brazos River, such as Richmond, Rosenberg, and Sugar Land.

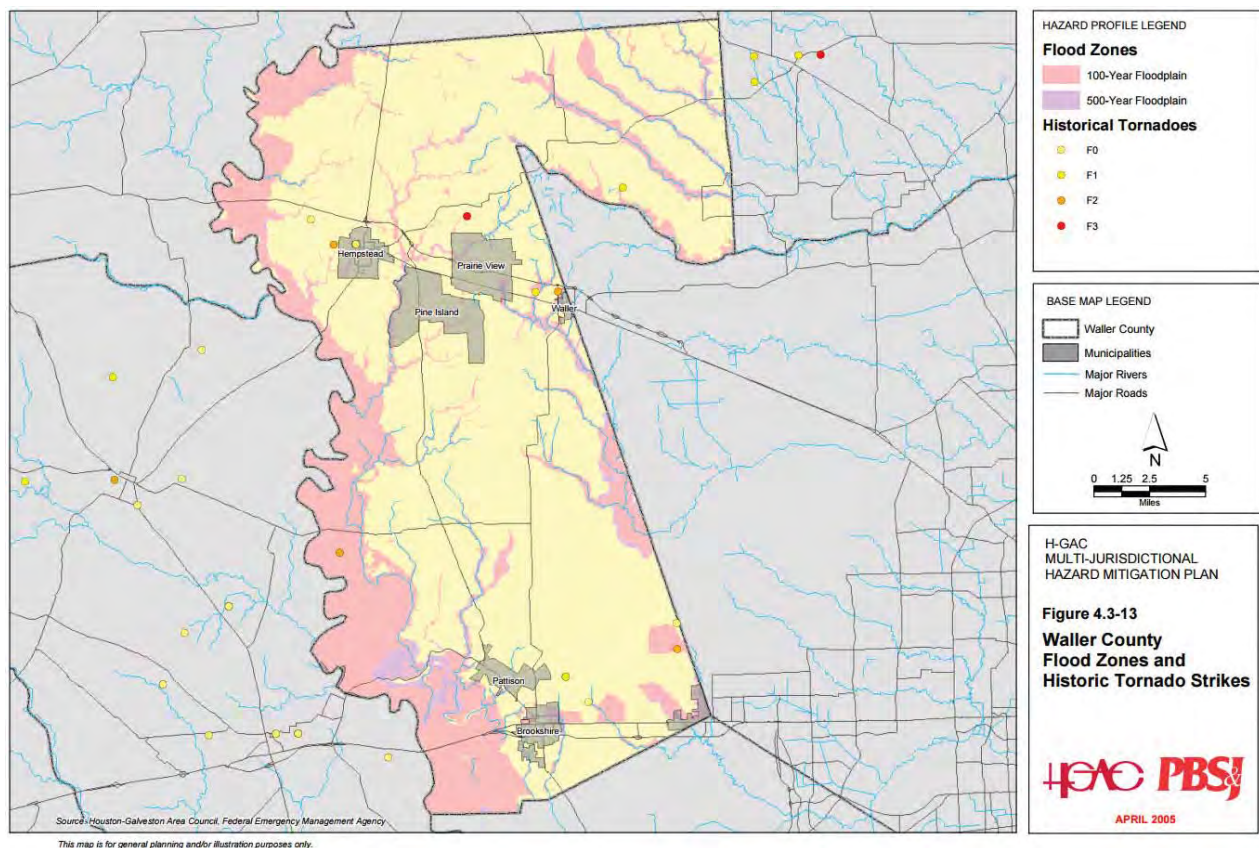


Figure K.2.1: Flood Zones Map 2006

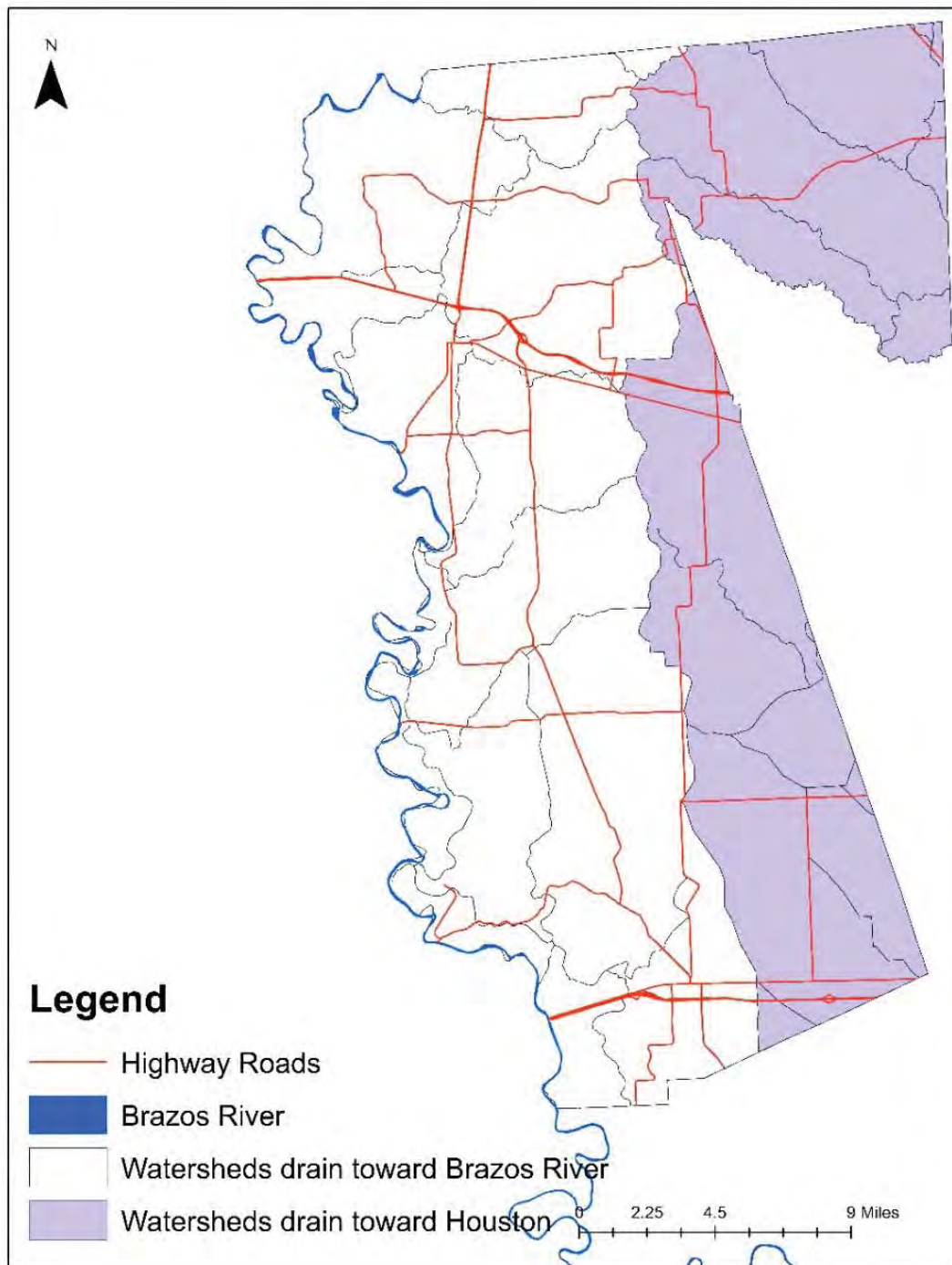


Figure K.2.1: Watershed Map

3. Land Cover

As seen in Figure K.3.1 the majority of the County is agricultural land, with dense forested areas to the north. As the County grows, development is anticipated along the 290 corridor, in the already established cities of Waller, Prairie View, and Hempstead.

Development is also anticipated along the I-10 corridor near Brookshire to Katy area. Thoughtful consideration of the environment, flooding impacts, and soils types will yield a county positioned for a prosperous future.

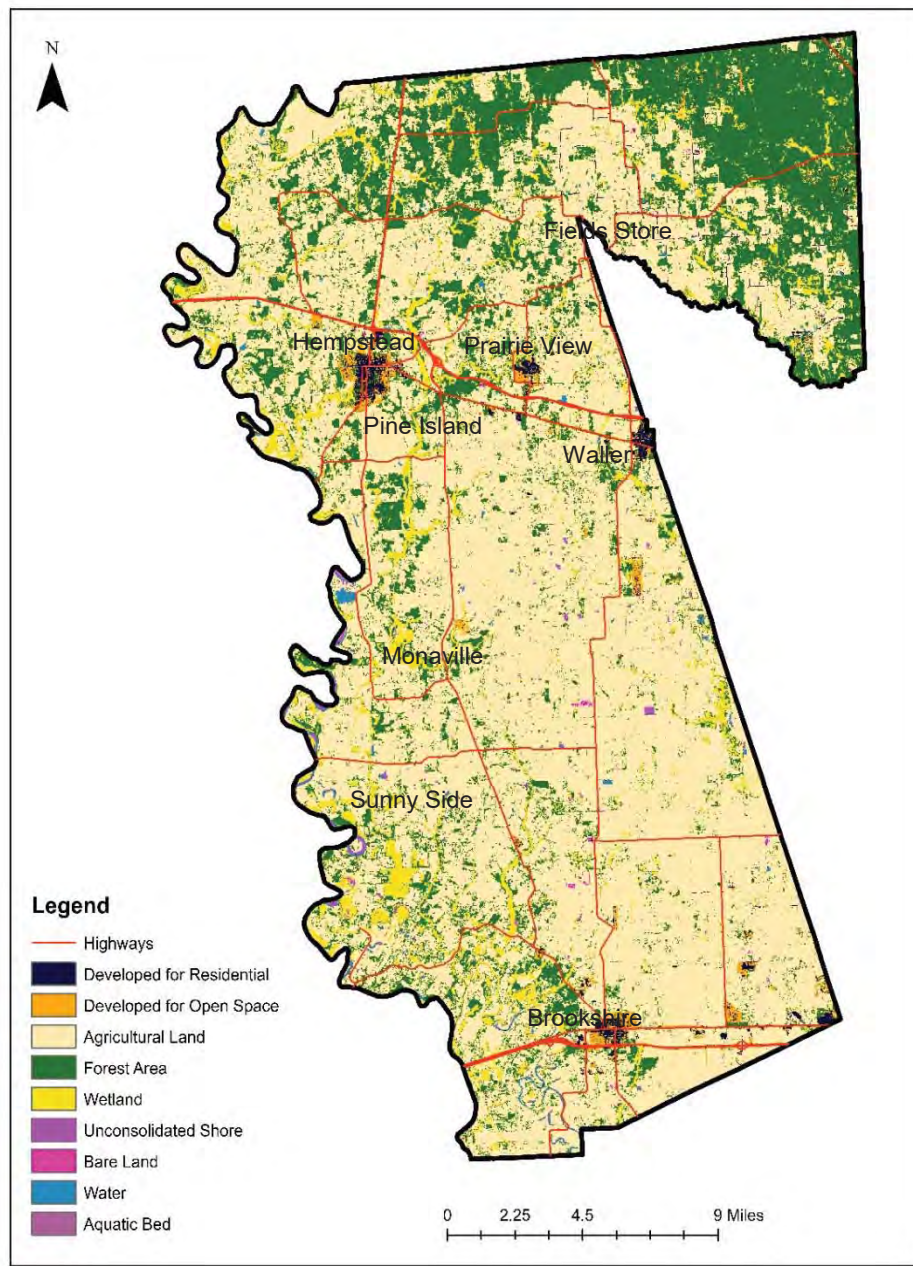


Figure K.3.1: Land Cover change 1996-2010

4. Soil

Looking at the soils in Waller County, there is an abundance of 'prime farmland' (Figure

K.4.1). Prime farmland produces the highest yields with minimal inputs of energy and economic resources.

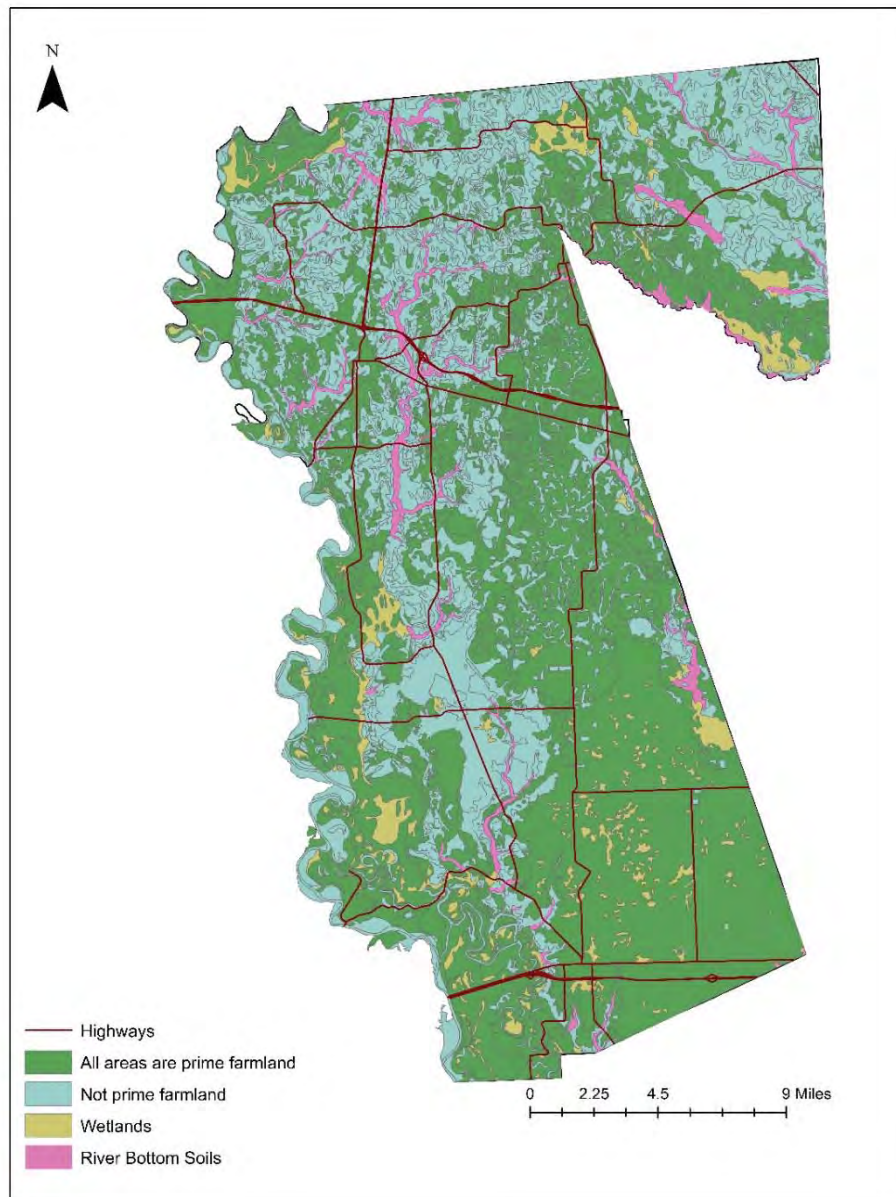


Figure K.4.1: Land Suitability

L. Infrastructure

1. Transportation

Waller County contains two important transportation connections, US highway 290

in the north and Interstate 10 in the south. Both roads are two of the three primary routes into the City of Houston, positioning the County for development opportunities. (Figure L.1.1).

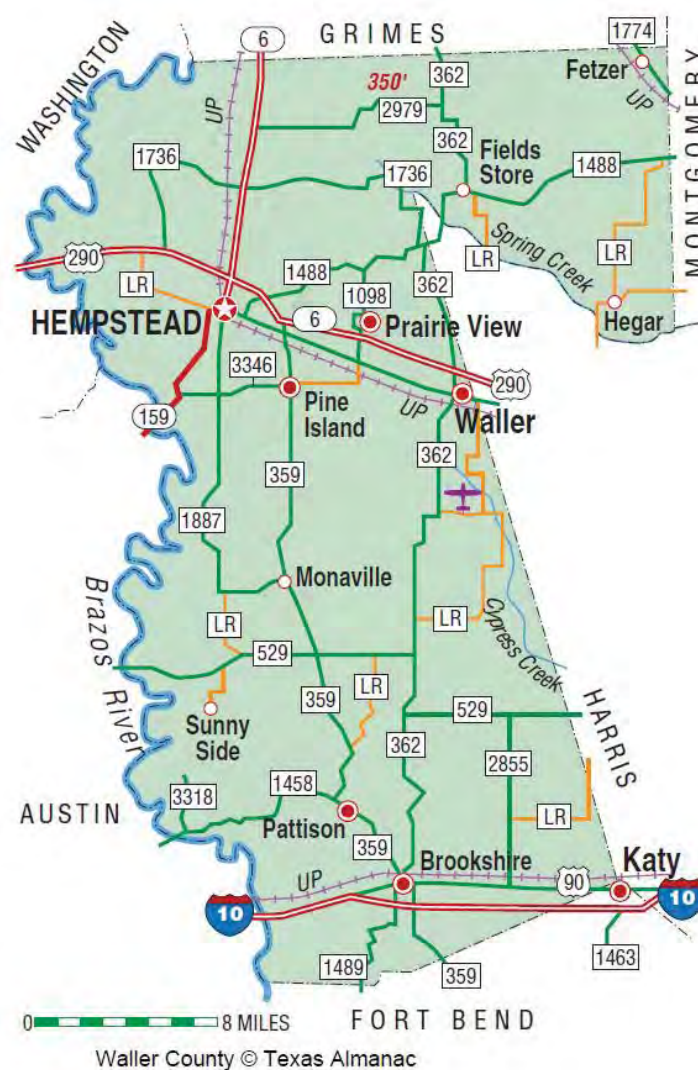


Figure L.1.1: Road/ Rail Connection

Currently 17% of residents car pool to work and 9% walk, take a bus or work at home (Figure L.1.2). Because of the high volume routes of Highway 290 and I-10, there are opportunities for alternative transportation options commuting to Houston. According to H-GAC Regional Travel Demand Model calculated in 2008, Weekday Peak Period Ridership is more than 6900 vehicles along Highway 290. Figure L.1.13 shows possible

commuter rail opportunities in the Houston area, one of which is the 290- Eureka rail route. It has the potential commute time of 20 minutes from downtown Houston to Waller County during the peak hour. This option would provide additional access to schools, workplace, and service providers (including medical clinics, daycare and various social service providers).

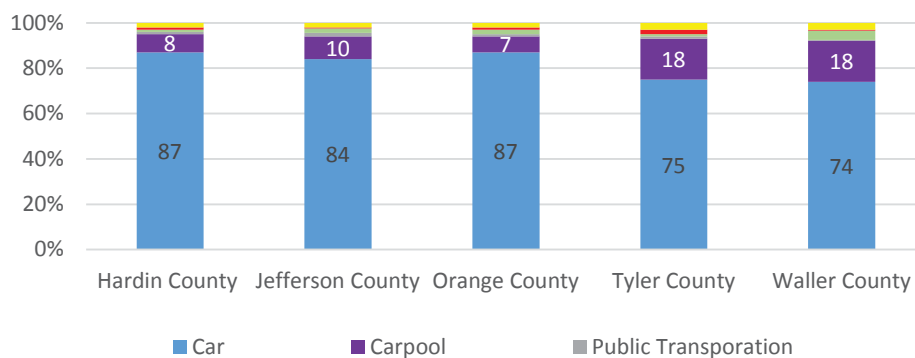


Figure L.1.2: Transportation Mode Choice to Work- Comparing

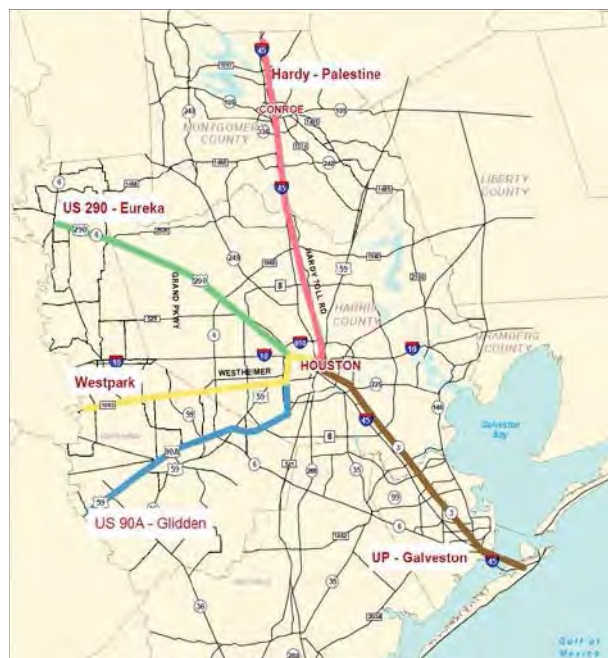


Figure L.1.3: Proposed Rail route H-GAC

Source: <http://www.txdot.gov/>

2. Facilities

Figure L.2.1 displays the location of police stations, fire stations, schools, healthcare, airports and parks throughout the County. The county has one hospital located in Prairie View but other major hospitals are relatively close:

- Tomball Regional Medical Center
- North Cypress Medical Center
- Methodist West Houston Hospital, Cypress Fairbanks Medical Center
- Memorial Hermann Katy Hospital, Christus St Catherine Hospital

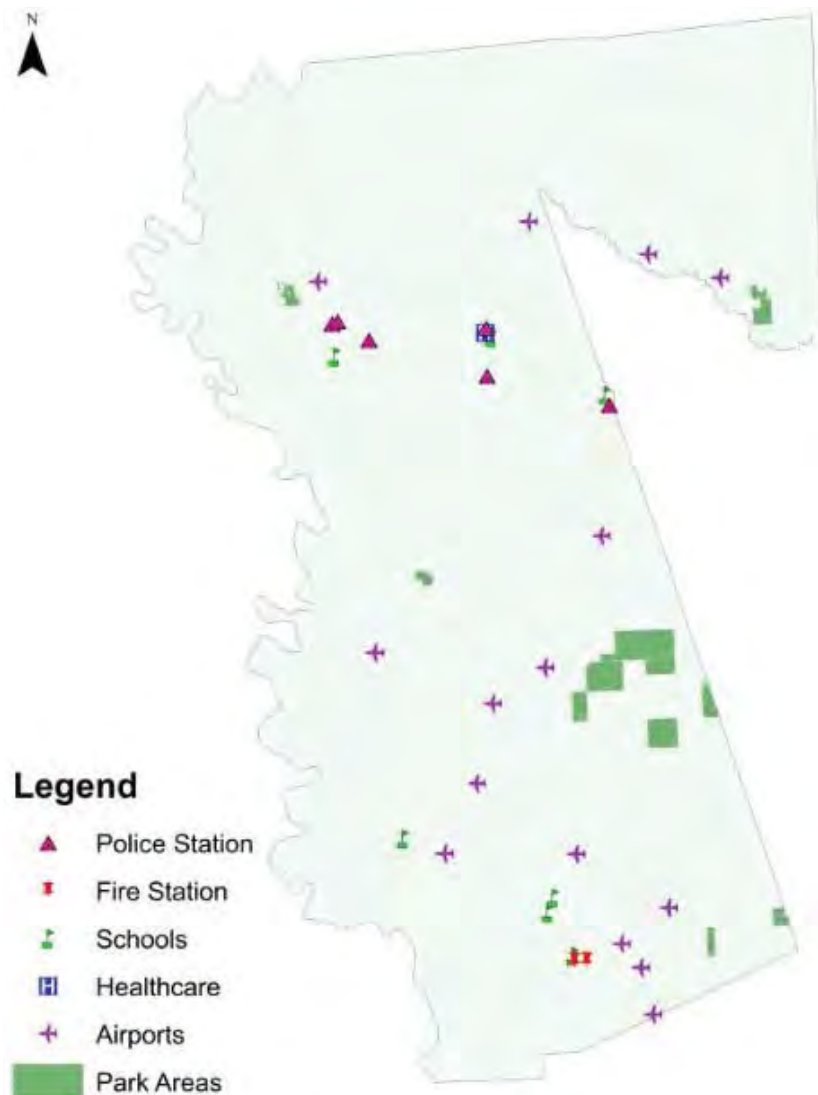


Figure L.2.1: Facilities Map

3. County Independent School Districts

Waller I.S.D.

The Waller Independent School District, serves the communities of Hockley, Prairie View and Waller. In April 1989, the district was revisited by an accreditation team from the Texas Education Agency and maintained full accreditation as a result of the visit. It has one elementary school, three middle schools, and two high schools.

Hempstead I.S.D.

The Hempstead School District has one elementary school, one middle school, and one high school and with the passage of a bond issue in 1996, the district has undertaken an aggressive building and renovation program. A new middle school was completed in the summer of 1997 and extensive renovations to the high school and elementary school were completed the following year. A new track facility was also

completed in 1998 and current planning is underway for a new athletic stadium.

Royal I.S.D.

The Royal Independent School District is located in southern Waller County and serves the communities of Brookshire, Pattison, Sunnyside and surrounding areas. In 2009, the school district was rated “academically acceptable” by the Texas Education Agency. It has two elementary schools, two middle schools and two high schools.

Katy I.S.D.

The Katy Independent School District is located in southeast corner of the Waller County in the city of Katy. A small portion of the Katy ISD serves the county. The school district has been recognized by the Texas Education Agency.



SECTION III.

REGIONAL CLUSTER ANALYSIS

SECTION III. Regional Cluster Analysis

Overview and Explanation

Waller County Region, TX

The Waller County Region is comprised of 8 Texas counties. The region includes large metropolitan area of Houston. Interstate 10 connects the region to San Antonio in the west and Louisiana in the east, and Interstate 45 connects the region to Dallas, TX in the north.

- Austin
- Brazos
- Fort Bend
- Grimes
- Harris
- Montgomery
- Waller
- Washington



B. Industry and Occupation

Components of changes in Jobs

Changes in Jobs (2009-2015)

Gained by	New Startups	+1,032,677
	Spinoffs	+376,363
	Expansion	+724,982
	In-migration	+66,870
Lost by	Closings	-1,253,731
	Contractions	-481,347
	Out-migration	-46,186
Net change		+419,628

An establishment is a physical business location.

Branches, standalones
And headquarters are all
considered types of
establishments.



Definition of Company Stages

0

Self-employed

1

2-9 employees

2

10-99 Employees

3

100-499 Employees

4

500+ Employees

Source: YourEconomy.org

B. Industry and Occupation

Establishments

Number of Establishments by Company Stages				
	2009		2015	
Stage	Establishments	Proportion	Establishments	Proportion
Stage 0	22,228	10%	23,761	8%
Stage 1	150,873	70%	224,464	76%
Stage 2	39,709	18%	42,893	15%
Stage 3	3,790	2%	3,760	1%
Stage 4	435	0.2%	426	0.1%
Total	217,035	100%	295,304	100%

Questions:

- What stage businesses have shaped the region's economic growth in the last 6 years?
- Which ones are growing or declining the most?
- Which stage of establishments are likely to shape the region's future economic growth?

Note: The table has some residual in 2009 establishments due to the lack of information on the Waller County.

Source: Youreconomy.org database

B. Industry and Occupation

Jobs and Sales

Number of Jobs by Company Stages

Year	2009	2015	% Change
Stage 0	22,228	25,487	15%
Stage 1	558,042	879,974	58%
Stage 2	966,493	1,003,050	4%
Stage 3	658,280	623,422	-5%
Stage 4	533,653	639,441	19.8%
Total	2,738,696	3,171,374	16%

Sales (\$Billions, 2015) by Company Stages

Year	2009	2015	% Change
Stage 0	4.97	13.5	173%
Stage 1	133.36	266.7	100%
Stage 2	212.43	320.7	51%
Stage 3	161.53	192.3	19%
Stage 4	105.82	57.2	-45.9%
Total	618.12	850.52	38%

Questions

- What establishments are the most numerous based on company stages?
- What stages have experienced the largest growth? The greatest decline?
- What company stage employs the largest number of people?
- What stage captures the most sales?
- Which ones have experienced the greatest percentage loss over the 2009-2015 period?

Note: The table has some residuals in 2009 establishments due to the lack of information on Waller County.

Source: Youreconomy.org database

B. Industry and Occupation

Top ten industry sector employment growth

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
55	Management of Companies and Enterprises	26,535	42,305	15,770	59%	36%
21	Mining, Quarrying, and Oil and Gas Extraction	112,289	145,687	33,398	30%	56%
61	Educational Services	54,799	68,846	14,047	26%	16%
72	Accommodation and Food Services	213,398	261,546	48,148	23%	18%
42	Wholesale Trade	140,473	168,933	28,460	20%	15%
56	Administrative and Support and Waste Management and Remediation Services	229,141	275,191	46,050	20%	19%
62	Health Care and Social Assistance	284,911	338,903	53,992	19%	15%
31	Manufacturing	225,499	258,093	32,594	14%	7%
54	Professional, Scientific, and Technical Services	259,374	296,119	36,745	14%	14%
81	Other Services (except Public Administration)	186,060	210,200	24,140	13%	11%

Questions:

- What regional industry sectors have seen the greatest growth?
- Did they grow at the same rate as the state?
- What factors are causing the growth?

Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors)

B. Industry and Occupation

Top two industry sector employment decline

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
22	Utilities	17,515	16,422	-1,093	-6%	1%
51	Information	43,588	42,985	-603	-1%	1%

Questions:

- How does the industry sector make-up of the region compare to the rest of the state?
- Which industry sectors are growing and declining the most in employment?



Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors)

C. Industry cluster analysis

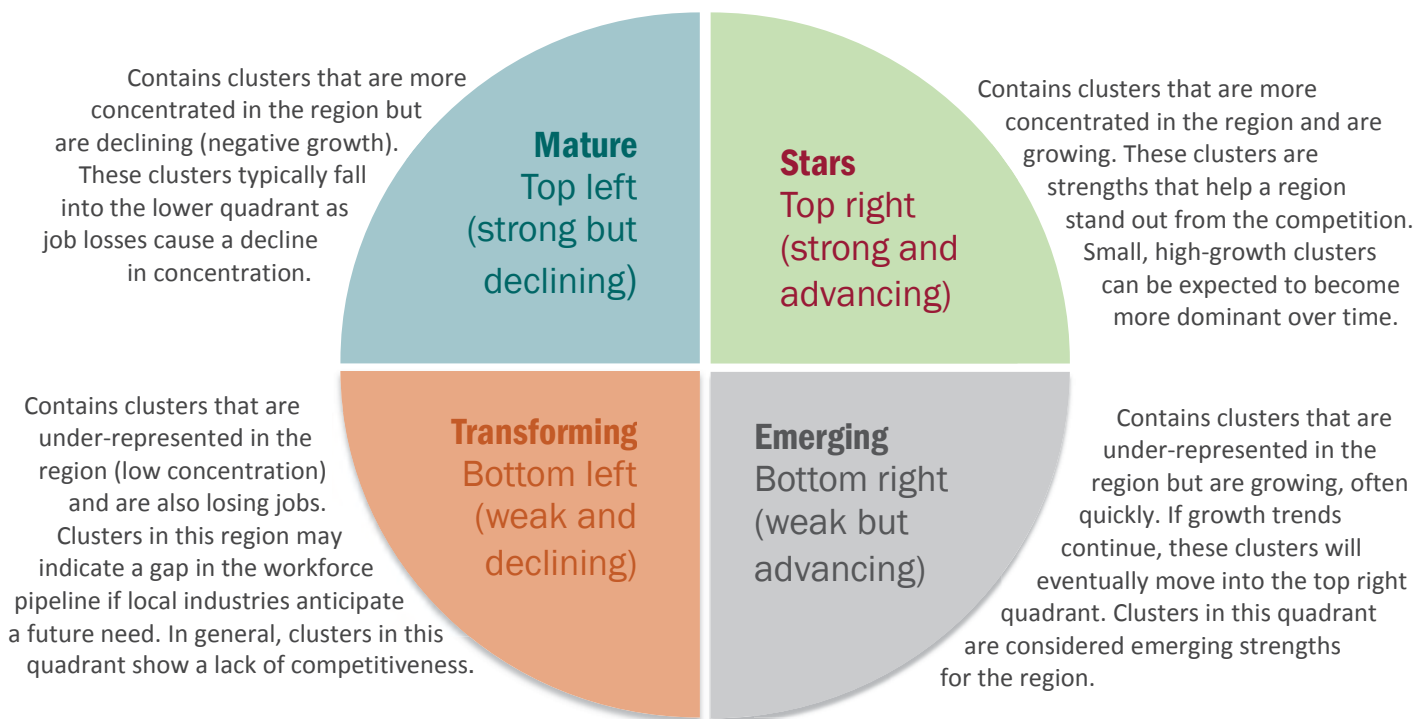
List of Clusters

- Advanced Materials
- Agribusiness, Food Processing & Technology
- Apparel & Textiles
- Arts, Entertainment, Recreation & Visitor Industries
- Biomedical/Biotechnical (Life Sciences)
- Business & Financial Services
- Chemicals
- Computer & Electronic Product Manufacturing
- Defense & Security
- Education & Knowledge Creation
- Electrical Equip, Appliance & Component Manufacturing
- Fabricated Metal Product Manufacturing
- Energy (Fossil & Renewable)
- Forest & Wood Products
- Glass & Ceramics
- Information Technology & Telecommunications
- Machinery Manufacturing
- Manufacturing Super-cluster
- Mining
- Primary Metal Manufacturing
- Printing & Publishing
- Transportation & Logistics
- Transportation Equipment Manufacturing

C. Industry cluster analysis

How to interpret cluster data results

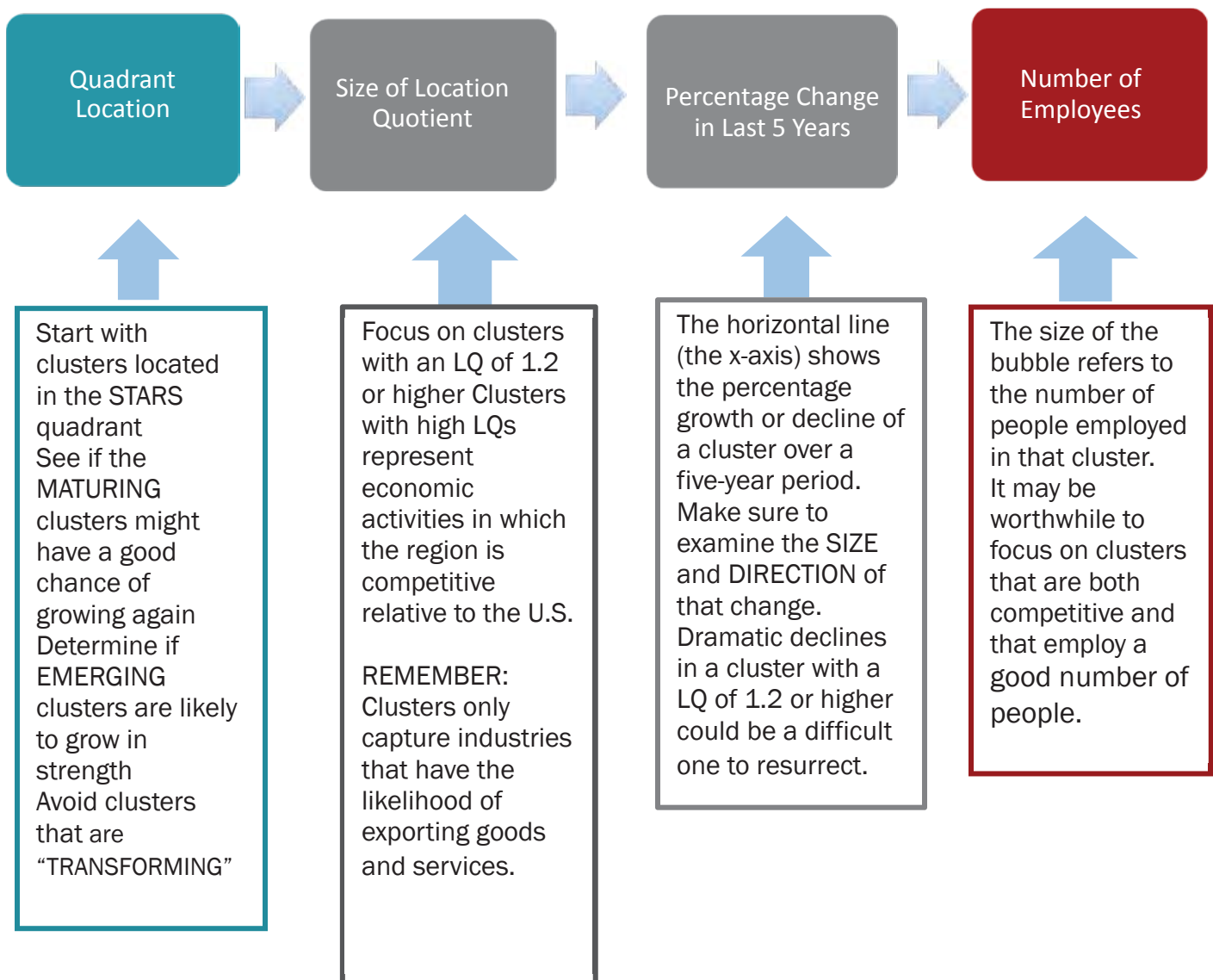
The graph's four quadrants tell a different story for each cluster.



Modified from: <http://www.charlestonregionaldata.com/bubble-chart-explanation/>

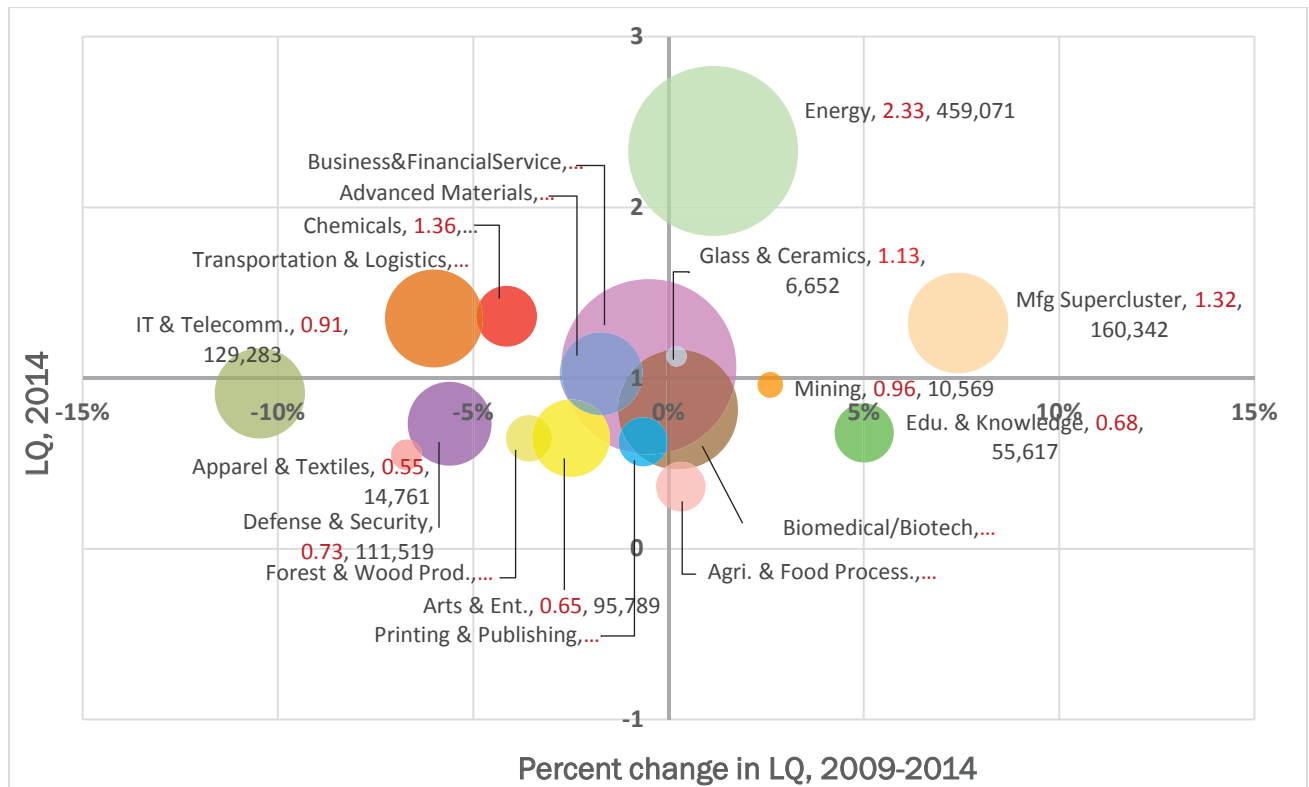
C. Industry cluster analysis

Bubble Chart: What to Look at First



C. Industry cluster analysis

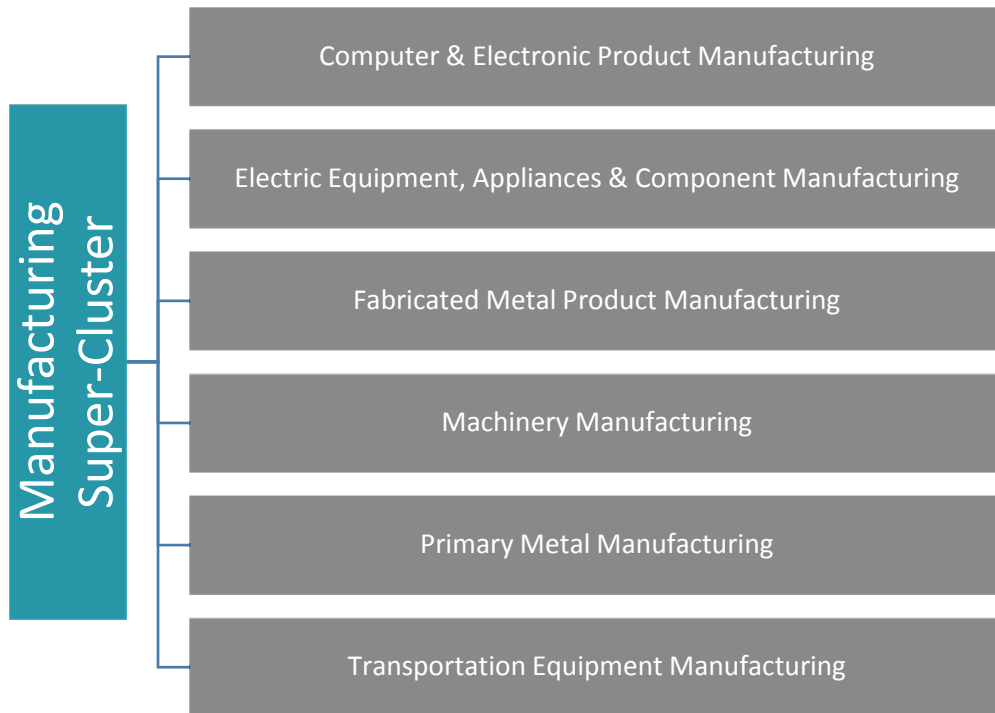
Industry cluster bubble chart



C. Industry cluster analysis

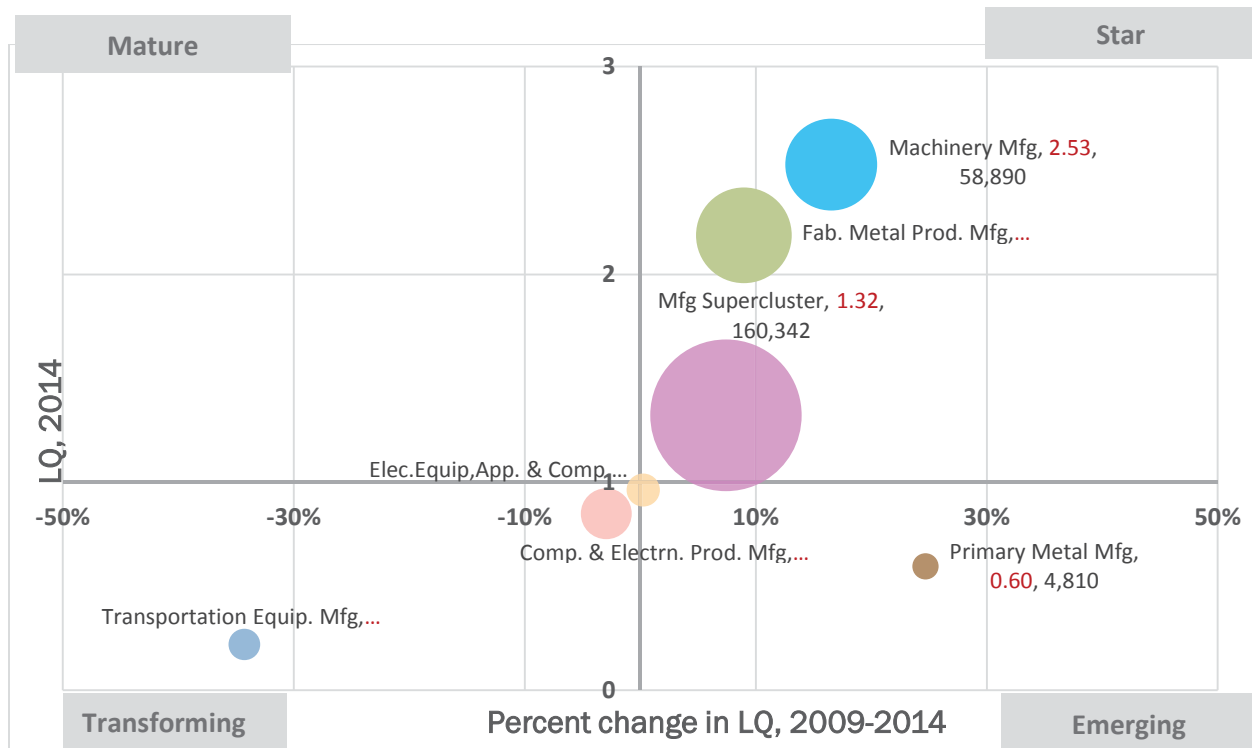
The Manufacturing Super-Cluster

Please note that this is not a cluster that a SET region should select. Rather, focus on the manufacturing sub-clusters that are important to that super-cluster.



C. Industry cluster analysis

Manufacturing sub-cluster bubble chart



Note: Label includes cluster name, LQ in 2014, and Employment in 2014.

Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors).

C. Industry cluster analysis

For your region

Mature Industries

Four industry clusters in the Waller County Region are in the Matured stage: Chemicals; Transportation & Logistics; Business & Financial Services; and Advanced Materials. The mature industries are relatively concentrated, but their growth is trending downward. It is worth noting, however, that the Region may find it worthwhile to invest in efforts to shore up the concentrations of these industries.

Transforming Industries

Transforming clusters capture the mix of industries that are experiencing relative decline and limited export capability. In the Region, eight industry clusters are all Transforming clusters, IT & Telecom.; Computer & Electronic Product Mfg.; Defense & Security; Arts, Ent., Rec. & Visitor Industries; Forest & Wood Products; Printing & Publishing; Apparel & Textiles; and Transportation Equipment Mfg. Any amount

of growth in these industries would require relatively large investments.

Star Industries

Star industry clusters are highly concentrated, exporting and still experiencing growth in the region. Four Star industry clusters in the Waller County Region are Machinery Mfg.; Energy; Fabricated Metal Prod. Mfg.; and Glass & Ceramics. These clusters have higher job concentrations in the region compared to the U.S.

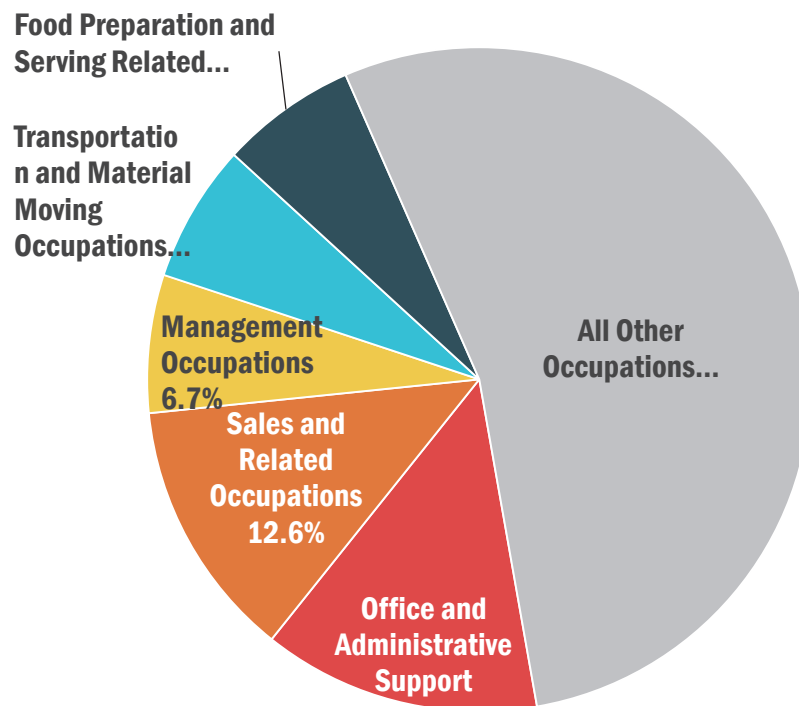
Emerging Industries

Industry clusters that may be poised for the future growth are classified as “Emerging.” There are six Emerging clusters in total in the Waller County Region: Mining; Electrical Equipment Appliance & Component Mfg.; Biomedical/Biotechnical; Education & Knowledge Creation; Primary Metal Mfg.; and Agribusiness, Food Processing & Technology.

Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors).

C. Industry cluster analysis

Top five occupations in 2014



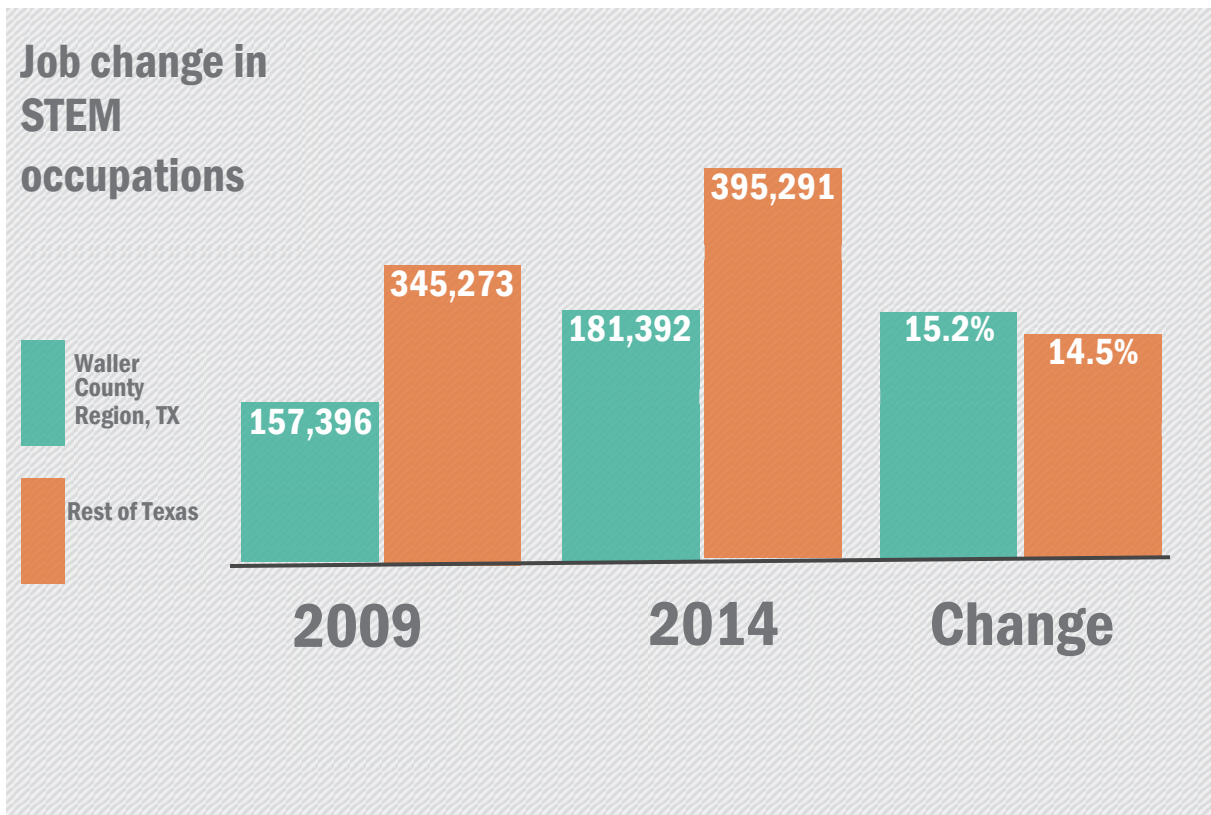
Questions:

- What are the education and skill requirements for these occupations?
- Do the emerging and star clusters align with the top occupations?
- What type salaries do these occupations typically provide?

Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors)

D. Occupation

Science, Technology, Engineering & Math



Questions:

- How do STEM jobs compare to the state?
- What has been the trend of STEM jobs over time?
- How important are STEM jobs to the region's Star and Emerging clusters?

*Note: STEM and STEM-related occupation definitions from BLS (2010)

Source: EMSI Class of Worker 2015.4 (QCEW, non-QCEW, self-employed and extended proprietors)

SECTION IV.

VISION AND STRATEGIC DEVELOPMENT

SECTION IV. Vision and Strategic Development

A. Vision

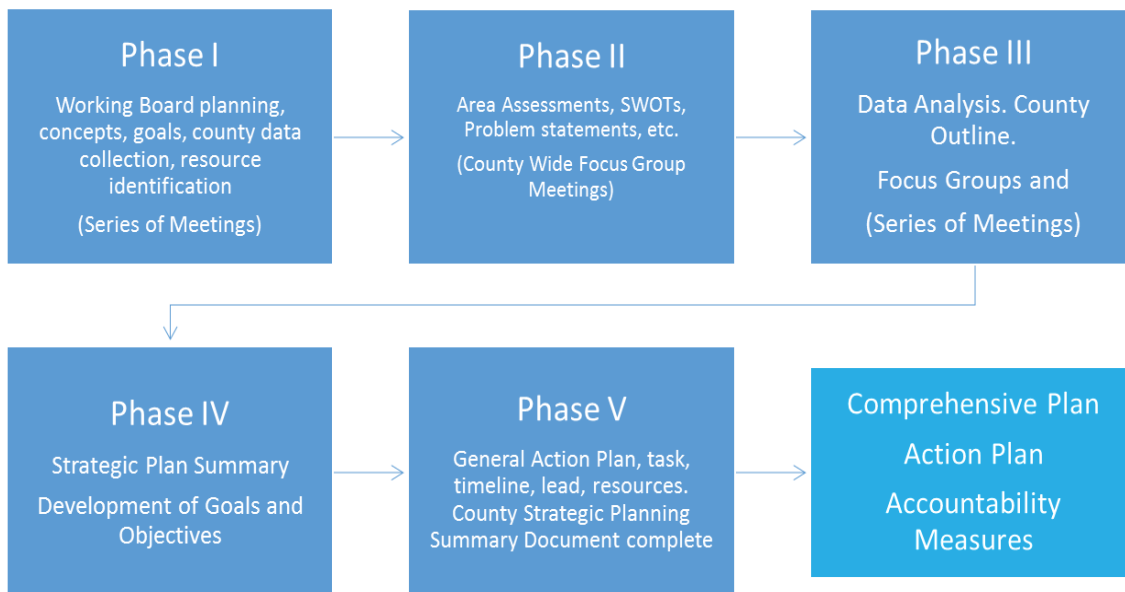
Waller County will be one of the first strategically-planned counties in Texas with a focus on responsible growth that preserves the heritage of the County and its natural resources.

B. Public and Stakeholder Engagement Process

To develop a vision for Waller County, we followed a process that included input from a variety of sources. The 2016 Waller County Strategic Planning Survey generated input from a random sampling of citizens,

including a supplemental question to identify what Waller County should focus on in the next 5-10 years. We gathered data from a variety of sources, both external and internal to county government.

In the Spring of 2016, a kick of breakfast was hosted at Prairie View A&M University. During this breakfast leaders were introduced to the strategic planning process and had an opportunity to provide feedback in order to guide the strategic planning team. These ideas provided more insight into areas of concern and areas of opportunity in the county.



C. Strengths

- Natural beauty & resources
- Access to metro cities & their facilities
- 290 & I-10
- Leadership
- Strong sense of community & involvement
- Education, especially higher education (PVAMU)
- Friendly, family environment
- Quality of life
- Experienced workforce
- Local churches/community group involvement
- Support for local businesses
- Agricultural presence
- Millions of grant funds

D. Weakness

- Infrastructure
- Schools, especially for younger grades
- Division between North & South
- Lack of communication
- Lack of planning/strategic plan
- Lack of quality, good-paying jobs
- Lack of housing
- No grant writer
- Lack of water rights control
- Groundwater pollution
- Unutilized fairgrounds
- Jobs/restaurants/shopping far from residential areas
- Not enough social services
- No county park/hospital
- Educational disparity
- Large county, separates citizens

- Internet
- Lack of family-oriented activities
- Outside pressures

E. Opportunities

- Retirement community
- Support local business & attract new businesses for jobs
- Improve schools, vocational training
- Recognize historical landmarks
- Recreational expansion (biking & parks, connect restaurants & retail areas)
- Tax revenue use for local projects
- Transit expansion (van/not rail)
- Utilize grant funding
- Ecotourism & tourism based on cultural heritage
- Undeveloped land space
- Farm-to-table local sourcing

F. Threats

- No plan for growth
- High speed rail, hazardous cargo traffic, Hwy 36 A
- Natural disasters, especially flooding
- Loss of green space
- Divisions in the county
- Excessive governmental control
- Crime/drugs
- Landfills
- External perceptions
- Encroachment of nearby cities
- High taxes

SECTION V.

ECONOMIC DEVELOPMENT STRATEGIES AND COMPONENTS

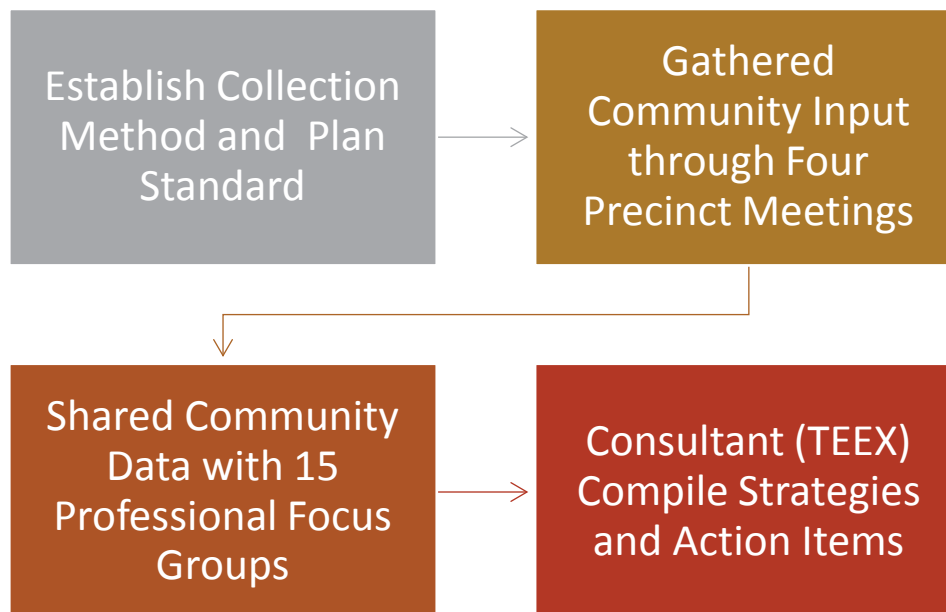
SECTION V. Economic Development Strategies and Components

A. Process Used to Develop Strategies

Through the guidance of Houston Galveston Area Council professionals the committee developed a structure for data collection from community members and professional focus group participants. Areas of studies were identified by the committee including economic development, transportation, infrastructure, water, education, workforce development, health and human services, natural resources and green space, and master planning. These areas were discussed at precinct meetings open to the community held in the four precincts of Waller County. Community participants

were urged to provide input on each of the areas as well as identify issues, priorities, advantages, and strengths through group presentations of a S.W.O.T. (strength, weaknesses, opportunities, threats) analysis of the County.

Community input was gathered and then presented to fifteen (15) professional focus group members who used this data to help them to develop strategies for addressing county issues. Following the focus group meetings, Texas A&M Engineering Extension Service (TEEX) compiled the strategic data into categories, and strategies. Condense



B. Strategic plan components and data collected

FOCUS AREA Municipalities

Vision proposed by focus group: Waller County will be one of the first strategically-planned counties in Texas with a focus on responsible growth that preserves the heritage of the County and its natural resources.

I. Preserve and enhance natural resources, with a focus on water management.

- a. Form a task force that partners with experts like PVAMU researchers to identify water resources, availability, and impact in Waller County with the power to enforce and educate on relevant environmental issues
- b. Develop plans to address water drainage and flooding throughout Waller County including maintenance of drainage ways, building better retention ponds, and building a County water reserve parks in each precinct
- c. Establish County-wide zoning regulations and ordinances to preserve natural resources such as water and support rural agriculture, where necessary

II. Promote smart, clean growth with consistent regulations and codes throughout Waller County.

- a. Establish a forum to discuss County zoning, building permits, and building quality standards that involves public leaders such as city councilmen, mayors, judges, and commissioners
- b. Explore tax incentives for energy efficient builders and homeowners

- c. Increase infrastructure capacity for future growth, especially for water and sewage
- d. Promote retail, restaurants, and entertainment districts that are connected to residential areas and develop county parks connecting communities
- e. Develop a plan for tourism growth that takes advantage of the County's historical significance and natural attractions in promoting tourism growth

III. Attract higher paying industries and alleviate economic disparity in the County.

- a. Ensure infrastructure is in place to attract targeted industries like energy
- b. Designate Enterprise Zones where applicable
- c. Obtain a unique zip code for Prairie View
- d. Hire a grant manager or agency to manage and execute proposal, grant writing, and grant management in order to maximize grant funding for expansion of infrastructure and business growth
- e. Implement school career and technology programs that address the needs of local employers and targeted industries

IV. Enhance the connectivity of Waller County with public transportation, particularly to and from Houston.

- a. Place metro bus stops in mutually convenient location(s) in Waller County
- b. Continue HOV/Bus lane from Houston to Hempstead
- c. Explore the possibility and feasibility of commuter rail

V. Establish a reputation for high quality education capable of drawing in and retaining a skilled workforce in the County, to the benefit of attracting targeted businesses to and development in the area.

- a. Develop mentoring programs involving actual employers for particular groups such as mental needs individuals or those in job preparation that are coordinated between school districts
- b. Ensure all school districts throughout Waller County reach exemplary status with businesses, parents, teachers, school boards, and the central office all involved in marketing school successes and supporting in-school activities
- c. Develop a support system to keep graduating high school students in the community through financial literacy training and PVAMU support and participation in local groups that encourage students to receive higher education locally
- d. Develop and promote high paying certification programs, alternative education and vocational training programs, university-level skill building programs, and district-wide cluster skills training
- e. Create and advertise new after school programs that will expose students at early age to career and technology education
- f. Re-establish the County-wide superintendent collaborative to bring ISDs together and identify common issues and best practices
- g. Increase the number of GED/alternative centers and open a career and tech facility supported by community employers

- h. Develop a community support group that can help implement and support plans to enhance education in Waller County

VI. Promote County and City collaborations to preserve and enhance the quality of life and infrastructure in Waller County.

- a. Have County and City administrators & engineers meet regularly and work together in development projects
- b. Ensure the County leads cities in establishing unified building ordinances and coordinating planning involving parks and water management
- c. Explore federal and state grant funds that can improve access to broadband in the community
- d. Increase County jail and additional law enforcement office facilities
- e. Develop a support group to help implement and support plans to improve quality of life in Waller County that involves a variety of individuals representing citizens, businesses, city leaders, schools, etc.

FOCUS AREA Infrastructure & Broadband (Drainage & Flooding)

Vision proposed by focus group: Waller County will be one of the first strategically-planned counties in Texas with a focus on responsible growth that preserves the heritage of the County and its natural resources.

I. Create larger budgets for infrastructure.

- a. Implement development communication based on advanced information to help drive planning

II. Plan for future county-wide wireless.

- a. Assess the economic feasibility of county-wide wireless
- b. Develop a wireless plan integrated with the development plan and subdivisions

III. Increase electrical system reliability and capacity.

- a. Develop a plan for the electrical system for individual users
- b. Visit service areas and implement automated systems technology (smart grid) based on user density

FOCUS AREA Economic Development / Poverty

Vision proposed by focus group: Waller County will be one of the first strategically-planned counties in Texas with a focus on responsible growth that preserves the heritage of the County and its natural resources.

I. Create policies and regulation methods for targeted development.

- a. Review what is in place and create a plan to improve methodology and policies.
- b. Seek legislative support to shape county planning capacity for development.

II. Improve workforce quality and viability.

- a. Implement a strategy to increase average per capita and median household income.
- b. Coordinate with ISDs and community colleges to connect programs with need.

III. Attract a broader array of desirable amenities.

- a. Conduct a periodic assessment to determine popular amenities.
- b. Target marketing to providers.
- c. Enhance tourism.

FOCUS AREA Housing

Vision proposed by focus group: Waller County will be one of the first strategically-planned counties in Texas with a focus on responsible growth that preserves the heritage of the County and its natural resources.

I. Increase residential and business district connectivity and attractiveness to visitors and residents alike.

- a. Revitalize existing town centers and ensure connectivity to residential communities
- b. Develop community programed activities to engage residents and visitors of all ages
- c. Review and update parking plans to maximize allocated space and prepare for growth
- d. Review and improve 36A transportation plan to enhance the connectivity of the region

II. Obtain and take advantage of resources necessary to promote economic and community development throughout Waller County.

- a. Hire a grant writer, such as Goodman, to find and obtain monetary support for County development
- b. Develop uniformity in internet access across the County

III. Provide educational resources to attract new residents and retain current residents in the community.

- a. Promote the development of a community college within the County
- b. Promote and utilize Houston-Galveston Area Council classes

FOCUS AREA Public Safety & Crime

Vision proposed by focus group: Waller County law enforcement will strive to deliver effective and professional law enforcement services to Waller County residents through broadminded partnerships with County and City Leaders, our community, and partner law enforcement agencies.

I. Engage in PVAMU College law enforcement internships.

- a. Develop a college law enforcement internship program that effectively utilizes college interns in assisting local law enforcement
- b. Allocate space at law enforcement agencies to accommodate interns

II. Enhance community relations with law enforcement.

- a. Highlight agency collaboration in the public's view
- b. Improve media relations
- c. Improve collaboration between departmental administrators

III. Establish a uniform and organized method to conduct performance ranking (evidence based policing).

- a. Conduct and analyze public surveys evaluating police performance
- b. Conduct and analyze employee surveys to evaluate departmental.

FOCUS AREA Education

Vision proposed by focus group: The Waller County Education Program, fully supported by the education services, will be a premier

employer-ISD collaboration to create a quality experience for students and families. ISDs will continue to graduate the best students who will return to the community as productive adults and educators.

I. Establish a collaborative network with other ISDs in Waller County.

- a. Establish a Waller County ISD Consortium that will allow for appointed parents, educators, and student leaders to unite and brainstorm the best practices to benefit all entities
- b. Establish at least one collaborative family event annually
- c. Establish at least one collaborative professional development event annually in collaboration with Prairie View A&M University and Lone Star College

II. Foster a stronger relationship between ISDs and Prairie View A&M University (PVAMU).

- a. Encourage ISD educators to get involved in campus programming and bring students to campus for tours
- b. Foster opportunities for ISD teachers, superintendents, principals to give talks and lectures as guest speakers on PV's campus and represent their ISDs at campus job fairs
- c. Connect with university deans to secure students interested in practicum and working as substitute teachers
- d. Establish a pipeline between the College of Education Teaching/Certification program and the ISDs
- e. Connect with campus student engagement to connect with campus

organizations looking for volunteer hours

III. Increase ISD visibility.

- a. Become stronger advocates by implementing programs to help educators and families understand how to navigate through the local, state, and federal political system.
- b. Create opportunities and connect with venues that will allow the ISDs to tell their story.
- c. Create unique opportunities to engage legislators in the work that is being done in the ISDs.

FOCUS AREA Transportation

Vision proposed by focus group: Waller County will be one of the first strategically-planned counties in Texas with a focus on responsible growth that preserves the heritage of the County and its natural resources.

I. Review and update County Major Thoroughfare and Freeway Plan (MTFP) and development regulations.

- a. Analyze the Houston Galveston Area Council sub-regional study, which begins in January 2017.
- b. Consider sensitive areas and agrarian interests when updating the thoroughfare plan.
- c. Explore multi-modal opportunities.
- d. Incorporate development regulation best practices from local and national sources.
- e. Seek horizontal and vertical integration of development regulations throughout the County.

- f. Advocate for changes to state law where appropriate.

II. Develop county and regional drainage & detention policies.

- a. Identify flood-prone areas.
- b. Explore the creation of additional and county-wide drainage management districts.
- c. Locate areas that might provide regional detention opportunities.

III. Develop a strategy to allow for city growth that preserves the natural aspects of more rural areas.

- a. Use incentives to encourage development where the County wants to see growth.
- b. Base further County development on models provided by currently well-developed master planned communities.

IV. Identify the County's priorities in terms of how it wants to develop.

- a. Consider other counties and determine what would work for Waller County.
- b. Identify what is important to the community and its citizens.

FOCUS AREA Agriculture and Natural Resources

Vision proposed by focus group: Waller County will be one of the first strategically planned counties in Texas with a focus on responsible growth that preserves the heritage of the County and its natural resources.

I. Preserve the rural nature of Waller County.

- a. Utilize incentives to influence development
- b. Target certain areas for high-density development
- c. Integrate smart, clean growth strategies into the County's economic development plan
- d. Engage in discussion on climate change impact

II. Preserve agriculture in Waller County.

- a. Establish secure networks to produce agriculture products for urban neighbors
- b. Develop new models of farming such as micro farms
- c. Devise a plan to keep agriculture affordable
- d. Offer educational programs on the value of agriculture to the county

III. Promote heritage-based economic drivers in Waller County.

- a. Continue to promote dove and waterfowl hunting.
- b. Encourage commercial and industrial development that align with Waller County's cultural and natural heritage.

IV. Aim for targeted development.

- a. Analyze new types of development to determine which are best suited for Waller County
- b. Conduct high-density development in specific areas to boost the tax base

FOCUS AREA Parks and Open Space

Vision proposed by focus group: Waller County will be one of the first strategically planned counties in Texas with a focus on responsible growth that preserves the

heritage of the County and its natural resources.

I. Preserve places with historical, cultural, and natural resource value.

- a. Identify areas that should not be developed such as floodplain and flood areas
- b. Develop partnerships with groups and/or individuals to help set aside land while it is currently available
- c. Create a plan to discourage development in potential set-aside areas and encourage development in more appropriate areas

II. Protect the quality and quantity of Waller County's water resources.

- a. Use flooding mitigation to earn income and protect land
- b. Create a water district

III. Acquire county parks.

- a. Create a county park master plan
- b. Explore the feasibility of establishing a part set aside fund to require developers to help fund more city-wide parks
- c. Develop partnerships to aid in developing county parks

IV. Create opportunities for bike and pedestrian trails.

- a. Make all roads multi-modal
- b. Develop a bike trail system using existing roads
- c. Explore how to allow bike access across rivers and major roadways

FOCUS AREA Health and Disease

Vision proposed by focus group: Waller County will be one of the first strategically planned counties in Texas with a focus on responsible growth that preserves the heritage of the County and its natural resources.

I. Provide a full range of comprehensive preventative, primary and behavioral health services to all county residents.

- a. Develop a comprehensive health plan which includes a needs assessment for Waller County
- b. Hire a County Health Officer whose duties will include coordinating the activities related to developing the health plan, as well as administrative support as necessary
- c. Establish a long-term stakeholders group to help design and implement the plan

II. Educate local leaders and residents about available services and the

importance of taking personal responsibility for their health.

- a. Offer relevant workshops for the county government
- b. Engage stakeholders through community meetings on the topics, including providers, extension service, churches, schools, and hospitals
- c. Establish a support group that includes stakeholders in planning and disseminating healthcare information

III. Place healthcare providers in all public schools.

- a. Educate the entire community - kids, parents, staff and board members - on the benefits of health care in the school system and discuss successful models Waller County ISDs can build on
- b. Secure funding to place health services in public schools



SECTION VI.
IMPLEMENTATION AGENDA

SECTION VI. Implementation Agenda

Municipalities

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy I : Preserve and enhance natural resources, with a focus on water management							
Strategic Action Item 1.A Form a task force that partners with experts like PVAMU researchers to identify water resources, availability, and impact in Waller County with the power to enforce and educate on relevant environmental issues							
Strategic Action Item 1.B Develop plans to address water drainage and flooding throughout Waller County including maintenance of drainage ways, building better retention ponds, and building a County water reserve parks in each precinct							
Strategic Action Item 1.C Establish County-wide zoning regulations and ordinances to preserve natural resources such as water and support rural agriculture, where necessary							

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy II: Promote smart, clean growth with consistent regulations and codes throughout Waller County.							

Strategic Action Item II.A Establish a forum to discuss County zoning, building permits, and building quality standards that involves public leaders such as city councilmen, mayors, judges, and commissioners							
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Strategic Action Item II.B Explore tax incentives for energy efficient builders and homeowners							
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Strategic Action Item IIC Increase infrastructure capacity for future growth, especially for water and sewage							
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Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy II: Promote smart, clean growth with consistent regulations and codes throughout Waller County.							

Strategic Action Item II.D Promote retail, restaurants, and entertainment districts that are connected to residential areas and develop county parks connecting communities								

Strategic Action Item II.E Develop a plan for tourism growth that takes advantage of the County’s historical significance and natural attractions in promoting tourism growth								

Strategy III: Attract higher paying industries and alleviate economic disparity in the County
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Strategic Action Item III.A Ensure infrastructure is in place to attract targeted industries like energy								

Strategic Action		Lead Agency and Partners	Resources	Timeline				
				Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy III: Attract higher paying industries and alleviate economic disparity in the County								
Strategic Action Item III.A Ensure infrastructure is in place to attract targeted industries like energy								
Strategic Action Item III.B Designate Enterprise Zones where applicable								
Strategic Action Item III.C Obtain a unique zip code for Prairie View								
Strategic Action Item III.D Hire a grant manager or agency to manage and execute proposal, grant writing, and grant management in order to maximize grant funding for expansion of infrastructure and business growth								

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy III: Attract higher paying industries and alleviate economic disparity in the County							
Strategic Action Item III.E Implement school career and technology programs that address the needs of local employers and targeted industries							
Strategy IV: Enhance the connectivity of Waller County with public transportation, particularly to and from Houston							
Strategic Action Item IV.A Place metro bus stops in mutually convenient location(s) in Waller County							
Strategic Action Item IV.B HOV/ Bus lane from Houston to Hempstead							

Strategic Action		Lead Agency and Partners	Resources	Timeline				
				Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy IV: Enhance the connectivity of Waller County with public transportation, particularly to and from Houston								
Strategic Action Item IV.C Explore the possibility and feasibility of commuter rail								
Strategy V: Establish a reputation for high quality education capable of drawing in and retaining a skilled workforce in the County, to the benefit of attracting targeted business to and development in the area								
Strategic Action Item V.A Develop mentoring programs involving actual employers for particular groups such as mental needs individuals or those in job preparation that are coordinated between school districts								
Strategic Action Item V.B Ensure all school districts throughout Waller County reach exemplary status with businesses, parents, teachers, school boards and the central office all involved in marketing school successes and supporting in school activities								

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy V: Establish a reputation for high quality education capable of drawing in and retaining a skilled workforce in the County, to the benefit of attracting targeted business to and development in the area							

Strategic Action Item V.C Develop a support system to keep graduating high school students in the community through financial literacy training and PVAMU support and participation in local groups that encourage students to receive higher education locally							
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Strategic Action Item V.D Develop and promote high paying certification programs, alternative education and vocational training programs, university-level skill building programs, and district- wide cluster skills training							
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Strategic Action Item V.E Create and advertise new after school programs that will expose students at early age to career and technology education							
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Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy V: Establish a reputation for high quality education capable of drawing in and retaining a skilled workforce in the County, to the benefit of attracting targeted business to and development in the area							

Strategic Action Item V.F Re-establish the County-wide superintendent collaborative to bring ISDs together and identify common issues and best practices							

Strategic Action Item V.G Develop a community support group that help implement and support plans to enhance education in Waller County							

Strategic Action Item V.H Develop a community support group that can help implement and support plans to enhance education in Waller County							

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy VI: Promote County and City collaborations to preserve and enhance the quality of life and infrastructure in Waller County							

Strategic Action Item VI.A Have County and City administrators & engineers meet regularly and work together in development projects							

Strategic Action Item VI.B Ensure the County lead cities in establishing unified building ordinances and coordinating planning involving parks and water management							

Strategic Action Item VI.C Explore federal and state grant funds that can improve access to broadband in the community							

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy VI: Promote County and City collaborations to preserve and enhance the quality of life and infrastructure in Waller County							

Strategic Action Item VI.D Increase County jail and additional law enforcement office facilities							

Strategic Action Item VI.E Develop a support group to help implement and support plans to improve quality of life in Waller County that involves a variety of individuals representing citizens, businesses, city leaders, schools etc.							



Infrastructure & Broadband (Drainage & Flooding)

Strategic Action		Lead Agency and Partners	Resources	Timeline				
				Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy I: Create larger budgets for infrastructure								
Strategy Action Item I.A Implement development communication based on advanced information to help drive planning								
Strategy II: Plan for future county- wide wireless								
Strategy Action Item II. A Assess the economic feasibility of county- wide wireless								
Strategy Action Item II. B Visit service areas and implement automated systems technology (smart grid) based on user density								

Strategic Action		Lead Agency and Partners		Resources		Timeline				
				Yr 1	Yr 2	Yr 3	Yr 4	Yr 5		
Strategy Action Item III. A Develop a plan for the electrical system for individual users										
Strategy Action Item III. A Develop a plan for the electrical system for individual users										
Strategy Action Item III.B Visit service areas and implement automated systems technology (smart grid) based on user density										



Economic Development/Poverty

Strategic Action		Lead Agency and Partners	Resources	Timeline				
				Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy I: Create policies and regulation methods for targeted development								
Strategy Action Item I.A Review what is in place and create a plan to improve methodology and policies								
Strategy Action Item II. B Seek legislative support to shape county planning capacity for development								
Strategy II: Improve workforce quality and viability								
Strategy Action Item II. A Implement a strategy to increase average per capita and median household income								

Strategic Action		Lead Agency and Partners	Resources	Timeline				
				Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy II: Improve workforce quality and viability								
Strategy Action Item II.B Coordinate with ISDs and community colleges to connect programs with need								
Strategy III: Attract a broader array of desirable amenities								
Strategy Action Item III. A Assess the economic feasibility of county- wide wireless								
Strategy Action Item III. B Target marketing to providers								
Strategy Action Item III.C Enhance tourism								

Housing

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr	Yr	Yr	Yr	Yr
			1	2	3	4	5
Strategy I: Increase residential and business district connectivity and attractiveness to visitors and residents alike.							

Strategy Action Item I.A Revitalize existing town centers and ensure connectivity to residential communities.			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5

Strategy Action Item I. B Develop community programed activities to engage residents and visitors of all ages.			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5

Strategy Action Item I. C Review and update parking plans to maximize allocated space and prepare for growth.			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy I: Increase residential and business district connectivity and attractiveness to visitors and residents alike							
Strategy Action Item I.D Review and improve 36A transportation plan to enhance the connectivity of the region.							
Strategy II: Obtain and take advantage of resources necessary to promote economic and community development throughout Waller County.							
Strategy Action Item II. A Hire a grant writer, such as Goodman, to find and obtain monetary support for County development.							
Strategy Action Item II. B Develop uniformity in internet access across the County							

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy III: Provide educational resources to attract new residents and retain current residents in the community.							

Strategy Action Item III. A Promote the development of a community college within the County.							

Strategy Action Item III. B Promote and utilize Houston-Galveston Area Council classes.							



Public Safety & Crime

Strategic Action		Lead Agency and Partners	Resources	Timeline				
				Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy I: Engage in PVAMU College law enforcement internships.								
Strategy Action Item I.A Develop a college law enforcement internship program that effectively utilizes college interns in assisting local law enforcement.								
Strategy Action Item I. B Allocate space at law enforcement agencies to accommodate interns								
Strategy II: Enhance community relations with law enforcement.								
Strategy Action Item II. A Highlight agency collaboration in the public's view.								

<i>Strategic Action</i>		<i>Lead Agency and Partners</i>	<i>Resources</i>	<i>Timeline</i>				
				<i>Yr</i> <i>1</i>	<i>Yr</i> <i>2</i>	<i>Yr</i> <i>3</i>	<i>Yr</i> <i>4</i>	<i>Yr</i> <i>5</i>
Strategy II: Enhance community relations with law enforcement.								
Strategy Action Item II.B Improve media relations								
Strategy Action Item II.C Improve collaboration between departmental administrators								
Strategy III: Establish a uniform and organized method to conduct performance ranking (evidence based policing).								
Strategy Action Item III.A Conduct and analyze public surveys evaluating police performance								



Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy III: Establish a uniform and organized method to conduct performance ranking (evidence based policing).							
Strategy Action Item III.C							
Conduct and analyze employee surveys to evaluate departmental performance							

Education

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy I: Establish a collaborative network with other ISDs in Waller County.							
Strategy Action Item I.A Establish a Waller County ISD Consortium that will allow for appointed parents, educators, and student leaders to unite and brainstorm the best practices to benefit all entities							
Strategy Action Item I.B Establish at least one collaborative family event annually							
Strategy Action Item I.C Establish at least one collaborative professional development event annually in collaboration with Prairie View A&M University and Lone Star College							

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy II: Foster a stronger relationship between ISDs and Prairie View A&M University (PVAMU).							

Strategy Action Item II.A Encourage ISD educators to get involved in campus programming and bring students to campus for tours							
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Strategy Action Item II.B Foster opportunities for ISD teachers, superintendents, principals to give talks and lectures as guest speakers on PV's campus and represent their ISDs at campus job fair							
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Strategy Action Item II.C Connect with university deans to secure students interested in practicum and working as substitute teachers							
---	--	--	--	--	--	--	--

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy II: Foster a stronger relationship between ISDs and Prairie View A&M University (PVAMU).							
Strategy Action Item II.D Establish a pipeline between the College of Education Teaching/Certification program and the ISDs							
Strategy Action Item II.E Connect with campus student engagement to connect with campus organizations looking for volunteer hours							
Strategy III: Increase ISD visibility							
Strategy Action Item III.A Create opportunities and connect with venues that will allow the ISDs to tell their story							

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy III: Increase ISD visibility							

Strategy Action Item III.B Become stronger advocates by implementing programs to help educators and families understand how to navigate through the local, state, and federal political system							
--	--	--	--	--	--	--	--

Strategy Action Item III.C Create unique opportunities to engage legislators in the work that is being done in the ISDs							
---	--	--	--	--	--	--	--



Transportation

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy I: Review and update County Major Thoroughfare and Freeway Plan (MTFP) and development regulations.							

Strategy Action Item I.A Analyze the Houston Galveston Area Council sub-regional study, which begins in January 2017							
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Strategy Action Item I.B Consider sensitive areas and agrarian interests when updating the thoroughfare plan							
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Strategy Action Item I.C Explore multi-modal opportunities							
--	--	--	--	--	--	--	--

<i>Strategic Action</i>	<i>Lead Agency and Partners</i>	<i>Resources</i>	<i>Timeline</i>				
			<i>Yr 1</i>	<i>Yr 2</i>	<i>Yr 3</i>	<i>Yr 4</i>	<i>Yr 5</i>
Strategy I: Review and update County Major Thoroughfare and Freeway Plan (MTFP) and development regulations.							

Strategy Action Item I.D Incorporate development regulation best practices from local and national sources							
--	--	--	--	--	--	--	--

Strategy Action Item I.E Seek horizontal and vertical integration of development regulations throughout the County							
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Strategy Action Item I.F Advocate for changes to state law where appropriate							
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<i>Strategic Action</i>	<i>Lead Agency and Partners</i>	<i>Resources</i>	<i>Timeline</i>				
			<i>Yr 1</i>	<i>Yr 2</i>	<i>Yr 3</i>	<i>Yr 4</i>	<i>Yr 5</i>
Strategy II: Develop county and regional drainage & detention policies.							

Strategy Action Item II.A Identify flood-prone areas							
--	--	--	--	--	--	--	--

Strategy Action Item II.B Explore the creation of additional and county-wide drainage management districts							
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Strategy Action Item II.C Locate areas that might provide regional detention opportunities							
--	--	--	--	--	--	--	--

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy IV: Identify the County's priorities in terms of how it wants to develop.							

Strategy Action Item IV.B Identify what is important to the community and its citizens							
--	--	--	--	--	--	--	--



Agriculture and Natural Resources

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy I: Preserve the rural nature of Waller County.							
Strategy Action Item I.A Utilize incentives to influence development							
Strategy Action Item I.B Target certain areas for high-density development							
Strategy Action Item I.C Integrate smart, clean growth strategies into the County's economic development plan							

<i>Strategic Action</i>		<i>Lead Agency and Partners</i>	<i>Resources</i>	<i>Timeline</i>				
				Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy I: Preserve the rural nature of Waller County.								

Strategy Action Item I.D Engage in discussion on climate change impact							

Strategy II: Preserve agriculture in Waller County.

Strategy Action Item II.A Establish secure networks to produce agriculture products for urban neighbors							

Strategy Action Item II.B Develop new models of farming such as micro farms							

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy II: Preserve agriculture in Waller County.							
Strategy Action Item II.C Devise a plan to keep agriculture affordable							
Strategy Action Item II.D Offer educational programs on the value of agriculture to the county							
Strategy III: Promote heritage-based economic drivers in Waller County.							
Strategy Action Item III.A Continue to promote dove and waterfowl hunting.							

<i>Strategic Action</i>	<i>Lead Agency and Partners</i>	<i>Resources</i>	<i>Timeline</i>				
			<i>Yr 1</i>	<i>Yr 2</i>	<i>Yr 3</i>	<i>Yr 4</i>	<i>Yr 5</i>
Strategy III: Promote heritage-based economic drivers in Waller County.							

Strategy Action Item III.B Encourage commercial and industrial development that align with Waller County's cultural and natural heritage.							
---	--	--	--	--	--	--	--

Strategy III: Aim for targeted development.

Strategy Action Item III.A Analyze new types of development to determine which are best suited for Waller County							
--	--	--	--	--	--	--	--

Strategy Action Item III.B Conduct high-density development in specific areas to boost the tax base							
---	--	--	--	--	--	--	--

Parks and Open Space

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy I: Preserve places with historical, cultural, and natural resource value.							

Strategy Action Item I.A Identify areas that should not be developed such as floodplain and flood areas							

Strategy Action Item I.B Develop partnerships with groups and/or individuals to help set aside land while it is currently available							

Strategy Action Item I.C Create a plan to discourage development in potential set-aside areas and encourage development in more appropriate areas							

<i>Strategic Action</i>	<i>Lead Agency and Partners</i>	<i>Resources</i>	<i>Timeline</i>				
			<i>Yr 1</i>	<i>Yr 2</i>	<i>Yr 3</i>	<i>Yr 4</i>	<i>Yr 5</i>
Strategy II: Protect the quality and quantity of Waller County's water resources.							

Strategy Action Item II.A Use flooding mitigation to earn income and protect land							
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Strategy Action Item II.B Create a water district							
---	--	--	--	--	--	--	--

Strategy III: Acquire county parks.							
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Strategy Action Item III.A Create a county park master plan							
---	--	--	--	--	--	--	--

<i>Strategic Action</i>	<i>Lead Agency and Partners</i>	<i>Resources</i>	<i>Timeline</i>				
			<i>Yr 1</i>	<i>Yr 2</i>	<i>Yr 3</i>	<i>Yr 4</i>	<i>Yr 5</i>
Strategy II: Acquire county parks.							

Strategy Action Item III.B Explore the feasibility of establishing a part set aside fund to require developers to help fund more city-wide parks							
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Strategy Action Item III.C Develop partnerships to aid in developing county parks							
---	--	--	--	--	--	--	--

Strategy IV: Create opportunities for bike and pedestrian trails.							
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Strategy Action Item IV.A Make all roads multi-modal							
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Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy IV: Create opportunities for bike and pedestrian trails.							

Strategy Action Item IV.B Develop a bike trail system using existing roads							

Strategy Action Item IV.B Explore how to allow bike access across rivers and major roadways							



Health and Disease

Strategic Action		Lead Agency and Partners	Resources	Timeline				
				Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy I: Provide a full range of comprehensive preventative, primary and behavioral health services to all county residents.								
Strategy Action Item I.A Develop a comprehensive health plan which includes a needs assessment for Waller County								
Strategy Action Item I.B Hire a County Health Officer whose duties will include coordinating the activities related to developing the health plan, as well as administrative support as necessary								
Strategy Action Item I.C Establish a long-term stakeholders group to help design and implement the plan								

Strategic Action		Lead Agency and Partners	Resources	Timeline				
				Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy II: Educate local leaders and residents about available services and the importance of taking personal responsibility for their health.								
Strategy Action Item II.A Offer relevant workshops for the county government								
Strategy Action Item II.B Engage stakeholders through community meetings on the topics, including providers, extension service, churches, schools, and hospitals								
Strategy Action Item II.C Establish a support group that includes stakeholders in planning and disseminating healthcare information								

Strategic Action	Lead Agency and Partners	Resources	Timeline				
			Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Strategy III: Place healthcare providers in all public schools.							

Strategy Action Item III.A Educate the entire community - kids, parents, staff and board members - on the benefits of health care in the school system and discuss successful models Waller County ISDs can build on							
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Strategy Action Item III.B Secure funding to place health services in public schools							
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SECTION VII.
APPENDICES

Appendix A: Planning committees and members

Prairie View A&M University Administration

Dr. George Wright, President of Prairie View A&M University

Dr. Corey Bradford, Senior Vice President for Business Affairs

Dr. Felicia Nave, Provost & Senior Vice President for Academic Affairs

Waller County Strategic Planning Committee

Jimmy Henry, Committee Chair,

Program Leader for Community & Economic Development, Prairie View A&M University

Dr. Danielle Hairston-Green, Committee Co- Chair, Program Specialist for Family & Consumer Sciences, Prairie View A&M University

Judge Trey Duhon, Waller County

Commissioner Jeron Barnett, Waller County Pct. 3

Vince Yokom, Waller County EDC

Dr. Terrance Finley, Business Affairs, Prairie View A&M University

Dr. Estwick Noel, Cooperative Agricultural Research Center, Prairie View A&M University

Bridget Ross, Director of Small Business Development Center (SBDC), Prairie View A&M University

Lloyd Hebert, Program Specialist for Community & Economic Development, Prairie View A&M University

Dr. William Turner, Cooperative Agricultural Research Center, Prairie View A&M University

Dr. Alton B. Johnson, Former Dean and Director of Land Grant Programs, College of Agriculture and Human Sciences, Prairie View A&M University

Stephan Gage, Houston-Galveston Area Council (H-GAC)

Dr. John Cooper, Texas Target Communities (TCC)

Jaimie Masterson, Texas Target Communities (TCC)

Ronald McDonald, Texas Rural Leadership Program (TRLP)

Lisa Mutchler, Texas A&M Engineering Extension Service (TEEX)

SueAnn Palmore, Texas A&M Engineering Extension Service (TEEX)

Mary Anne Piacentini, Katy Prairie Conservancy

Jennifer Powis, Katy Drainage District

Carol Courville, San Bernard Electric Cooperative, Inc. (SBEC)

Dr. Sam Arungwa, Communities That Care (CTC)

Judith Daniels, City of Prairie View EDC and Empty Eye Construction & Property Management, Inc.



Appendix B: Kick-off, precinct, focus group participants

Waller County Precinct Participants

Brandt Mannchen
Wayne LeBlanc
Debra Ferris
Larry Cates
Debbie Cates
Linda Durham
Steve Chalfant
Christen Hatfield
Reed Vestel
Jennifer Stephen
Shirley Thompson
Paris Kinkaid
John Isom
Rosa Patlan Harris
Dr. L.H. Lockett
Stacy Ayers
Jen Powis
Commissioner John Amsler
Tamara Fraley
Steven Fraley
Connie Amsler
Francis J. Rudzen
Wanda White
Dana Nelson
Kent Fleshner
Harvey Laas
Robert MacCallum
Emma MacCallum
Brian Waggoner

Waller County Precinct Participants

Eileen Birney
Kelly Sorge
Mack Reynolds
Daniel W. Banks
Laura Jauregui
Don Phillips
Butch Crawford
Sidney Phillips
Stacey Chandler
Janet Fisher
Dr. Estwick Noel
Pat Bruegger
Tracy Sebesta
Mary Ann Drawl
Pandy Hardeway
Cynthia Davis
L.M. Marcus
Kevin Moran
Russell Klecker
Audrey Luther
David Luther
Cindy Jones
Steve Lee
Sam Arungwa
Priscilla Johnson
Rhonda Jordan
Gary Henson
David Tinney
Arthur W. West
Johnson

Waller County Precinct Participants

Kimen Wheeler
Doug Wheeler
Robb Bashaw
Alison Tyler
Kathy Sprecher
David Sprecher
Mayor Danny Marburger
Kirby
Bill Goluby
Wesley Newman
Eunice Carroll
Carrie Gourly
Dennis Shirley
Nancy Arnold
Mayor David Allen
Louise Doman
James Larry
David Benzion
Myeshia Roach
Samara T. Greggs
Glenn A. Hegar
Patti Payne
Doug Jordan
Ruth Lohmer
Ted Krenek
Kent Fleshner
Linda C. Langlitz
Catalena Langlitz
Marilyn Vaughn

Waller County Precinct Participants

Pat Craft
Jason Rusch
Mayor Joe Garcia
Raymond Dollins
Dana Nelson
Houston Butcher
Mary Martin
Marian Balke
Ben Lohmer
Sandy West
Stan Kitzman
Gabriela Parih
Kim C. Branch
Bridget Ross
Kathy McPherson
Wallace Everitt
Pat Keeling
Irene Mattox
Connie Turner
Nathaniel Richardson
Christian Godwin
Lillie Diley
Roland Stasny
Cindy Stasny
Travis Sellers
Commissioner Jeron
Denise Mattox
Rosie Powell
David Benzion

Appendix B: Kick-off, precinct, focus group participants

Focus Group Participants

Agriculture and Natural Resources

Dr. Estwick Noel, Prairie View
A&M University

Mary Ann Piacentini, Katy Prairie
Conservancy

Raymond Dollins, Brookshire-Katy
Drainage District

Trey Bethke, Natural Resources
Conservation Service

Matt Brazil, Civil Engineers, Jones
& Carter (with Kalkomey)

Jeff Cemi, Texas State Soil and
Water Conservation

Stephanie Damron, Texas Parks
and Wildlife

Dr. Nelson Daniels, Prairie View A
& M University Cooperative
Extension Service

David Dilorio, Dilorio Farms

Larry Jones, Navasota Soil and
Water Conservation District

Charles Kalkomey, Brookshire-Katy
Drainage District

Brian Koch, Texas State Soil and
Water Conservation

Harvey Lass, Navasota Soil and
Water Conservation District

Glenn Laird, Harris County Flood
Control District

Wesley Newman, Katy Prairie
Conservancy

Tom Paben, Waller County Farm
Bureau

Focus Group Participants

Agriculture and Natural Resources

Sam Reese, Katy Prairie
Conservancy/Warren Ranch

Diane Russell, Coastal Prairie
Chapter Master Naturalists

Yancy Scott, Waller County
Engineer

Stacie Villareal, Texas AgriLife -
County Extension Agent

Vince Yokum, Waller County EDC

Focus Group Participants

Education

Dr. Danielle Hairston-Green,
Prairie View A&M University

Dr. Terrance Finley, Prairie View
A&M University

Carol Bates, Waller ISD-Jones
Elementary School Principal

Ryan Steele, Royal ISD Deputy
Superintendent

Keri Houston, Royal ISD Educator

Susie Hopkins, Royal ISD Early
Childhood Center Principal

Mandy Burks, Hempstead
Elementary School Assistant
Principal

Economic Development and Poverty

Vince Yokom, Waller County
Economic Development

Carol Courville San Bernard
Electric Cooperative, Inc. (SBEC)

Economic Development and Poverty

John Spiess, San Bernard Electric
Cooperative, Inc. (SBEC)

Chuck Norrell, KDW (Commercial
Developers)

David Tinney, LJA Engineering

Anthony Francis, LJA Engineering

Greg Turner, Turner Duran
Architects

Focus Group Participants

Health and Disease

Harvey Laas, AccessHealth

Dr. Sam Arungwa, Communities
That Care (CTC)

Bobbie Wilson, United Way

Carol Edwards, CEO of Access
Health

Eric Todd, CEO of Health Point
accompanied by his Assistant

Kilian William, DSHS Regional
Office, Houston, TX

Rachel Kubala, RN, DSHS Bellville
Clinic

Focus Group Participants

Housing

Christopher Cotton, Prairie View
A&M University

Judith Daniels, City of Prairie
View EDC and Empty Eye
Construction & Property
Management, Inc.

Chris Romani, Texas Precast Inc.

Appendix B: Kick-off, precinct, focus group participants

Focus Group Participants

Housing

Ronald Leverett, Prairie View EDC
Tom Condon, Collier International

Focus Group Participants

Infrastructure and Broadband

Vince Yokom, Waller County Economic Development
Carol Courville, San Bernard Electric Cooperative, Inc. (SBEC)
John Spiess, San Bernard Electric Cooperative, Inc. (SBEC)
Joe Olivares, San Bernard Electric Cooperative, Inc. (SBEC)
Gary Guthman, San Bernard Electric Cooperative, Inc. (SBEC)
Chuck Norrell, KDW (Commercial Developers)

Focus Group Participants

Parks and Open Space

Mary Ann Piacentini, Katy Prairie Conservancy
Stephan Gage, Houston-Galveston Area Council (H-GAC)
Dr. Estwick Noel, Prairie View A&M University
Matt Baumgarten, SWA Group
Augustus Campbell, West Houston Association
Dewayne Davis, Waller County Deputy Engineer
Tom Douglas, Sierra Club
Diana Foss, Texas Parks and Recreation Department

Focus Group Participants

Parks and Open Space

John Isom, City of Waller EDC
Deborah January-Bevers, Houston Wilderness
Brandt Mannchen, Sierra Club
Clark Martinson, Energy Corridor
Yancy Scott, Waller County Engineer
Juan Serna, Brown & Gay/Gilbert Associates
Dick Smith, Cypress Creek Greenway Project

Focus Group Participants

Public Safety and Crime

Mayor David Allen, City of Prairie View
Chief Anthony Solomon, City of Prairie View
Sheriff R. Glenn Smith, Waller County Sheriff's Office
Chief Deputy Craig Davis, Waller County Sheriff's Office
Chief Deputy Brian Cantrell, Waller County Sheriff's Office
Captain Joe Hester, Waller County Sheriff's Office
Sergeant Darren Vacek, Texas Department of Public Safety
Corporal Victor Gails, Texas Department of Public Safety
Steve Underhill, Waller Independent School District
Chief Michael Williams, Waller Police Department

Focus Group Participants

Public Safety and Crime

Sergeant Michael Henderson, Waller Police Department
Chief Laketra Douglas, Hempstead ISD Police Department
Dr. Sam Arungwa, Communities that Care (CTC)

Focus Group Participants

Transportation and County Planners

Stephan Gage, Houston-Galveston Area Council (H-GAC)
Mary Ann Piacentini, Katy Prairie Conservancy
Dr. Estwick Noel, Prairie View A&M University
Augustus Campbell, West Houston Association
Judith Daniels, City of Prairie View EDC and Empty Eye Construction & Property Management, Inc.
Dewayne Davis, Waller County Deputy Engineer
Marie Herndon, Prairie View City Council
John Isom, City of Waller EDC
Grady Mapes, Transportation
Clark Martinson, Energy Corridor
Fred Mathis, Harris County
Amar Mohite, City of Houston
Gene Schmidt, City of Waller

Appendix B: Kick-off, precinct, focus group participants

Focus Group Participants

Transportation and County Planners

Yancy Scott, Waller County Engineer
Seab A. Smith, CERT Member, Prairie View, TX

Focus Group Participants

Municipalities Focus Groups

City of Brookshire

Nathaniel Richardson, City of Brookshire EDC
Jimmy Henry, Prairie View A&M University
SueAnn Palmore, Texas A&M Engineering Extension Service (TEEX)

City of Hempstead

Mayor Michael S. Wolfe, City of Hempstead
Malcolm Brown, City of Hempstead EDC
Jimmy Henry, Prairie View A&M University

City of Katy

Dr. Danielle Hairston-Green, Prairie View A&M University
Byron Hebert, City of Katy Administrator
Anas Garfoui, Planning Technician
Lloyd Hebert, Prairie View A&M University
Jimmy Henry, Prairie View A&M University

Focus Group Participants

Municipalities Focus Groups

City of Katy

Lisa Mutchler, Texas A&M Engineering Extension Service (TEEX)
SueAnn Palmore, Texas A&M Engineering Extension Service (TEEX)

City of Pattison

Mayor Joe Garcia, City of Pattison
Jimmy Henry, Prairie View A&M University
Dr. Danielle Hairston-Green, Prairie View A&M University

City of Pine Island

Debra “Debi” Ferris, Former Mayor, City of Pine Island
Commissioner Steve Nagen, City of Pine Island
Jimmy Henry, Prairie View A&M University
SueAnn Palmore, Texas A&M Engineering Extension Service (TEEX)

City of Waller

Mayor Danny Marburger, City of Waller
Dr. Edna Eaton, City of Waller
Sydney Johnson, City of Waller Mayor Pro Team
Cynthia Ward, City of Waller Secretary
Gene Smith, City of Waller, Extension Service (TEEX)

Focus Group Participants

Municipalities Focus Groups

City of Waller

Lloyd Hebert, Prairie View A&M University
Jimmy Henry, Prairie View A&M University
SueAnn Palmore, Texas A&M Engineering

City of Prairie View

Mayor David Allen, City of Prairie View
Kim Washington-Garrett, Former Prairie View City Council
Marie Herndon, Prairie View City Council
Judith Daniels, City of Prairie View EDC and Empty Eye Construction & Property Management, Inc.
Dr. Lushia White, (no affiliation listed)
Lloyd Hebert, Prairie View A&M University
Jimmy Henry, Prairie View A&M University
Lisa Mutchler, Texas A&M Engineering Extension Service (TEEX)
SueAnn Palmore, Texas A&M Engineering Extension Service (TEEX)

Appendix B: Kick-off, precinct, focus group participants

Waller County Strategic Planning Breakfast Kick-off Attendees

Commissioner John Amsler, Waller County Pct. 1

Nancy Arnold, Waller City Council

Commissioner Jeron Barnett, Waller County Pct. 3

Commissioner Justin Beckendorff, Waller County Pct. 4

Representative Cecil Bell, State of Texas

Mike Boehnke, Waller County Auditor

Dr. Corey Bradford, Prairie View A&M University

Chuck Brawner, City of Katy

Sylvia Cedillo, Waller County

Dr. John Cooper, Texas Target Communities (TTC)

Carol Courville, San Benard Electric Cooperative, Inc. (SBEC)

Judge Trey Duhon, Waller County

Truman Edminster, EHRA

Debi Ferris, Former Mayor, City of Pine Island

Dr. Terence Finley, Prairie View A&M University

Anthony Francis, LJA Engineering

Anas Garfaoui, City of Katy

Sandra Gonzalez, Small Business Development Center (SBDC), Prairie A&M University

John Grounds, LJA Engineering

Dr. Danielle Hairston-Green, Prairie View A&M University

Waller County Strategic Planning Breakfast Kick-off Attendees

Bryon Hebert, City of Katy Administrator

Jimmy Henry, Prairie View A&M University

Gray Henson, Jr., EHRA

Mayor Fabol Hughes, City of Katy

John Isom, City of Waller EDC

Frank Jackson, Former Mayor, City of Prairie View

Darryl Johnson, Waller County

Sidney Johnson, City of Waller Mayor Pro Team

Dr. Alton Johnson, Former Dean and Director of Land Grant Programs, College of Agriculture and Human Sciences, Prairie View A&M University

Gray Jones, Katy City Council

Commissioner Russell Klecka, Waller County Pct. 2

Senator Lois Kolkhorst, State of Texas

Harvey Laas, AccessHealth

Mayor Danny Marburger, City of Waller

Elton Mathis, Waller County District Attorney

Dr. Denise Mattox, Waller County

Bill Mathews, Former Mayor, City of Pattison

Ronald McDonald, Texas Rural Leadership Program (TRLP)

Dr. Michael McFrazier, Prairie View A&M University

Waller County Strategic Planning Breakfast Kick-off Attendees

Dr. Felicia Nave, Prairie View A&M University

Dr. James Palmer, Prairie View A&M University

Andy Perry, Houston, Executive Airport

Mary Ann Piacentini, Katy Prairie Conservancy

Jennifer Powis, Katy Drainage District

Dr. Michael Prince, Prairie View A&M University

Kayce Renia, Prairie View A&M University

Orval Rhoades, Waller County Engineer

JL Rose, Brookshire Katy Drainage District

Jim Russ, EHRA

Joan Sargent, Waller County Treasurer

Yancy Scott, Waller County Engineer

Reginal Smith, LJA Engineering

Sheriff Glenn Smith, Waller County

Jack Steele, Houston-Galveston Area Council

David Tinney, LJA Engineering

Fred Washington, Prairie View A&M University

Jarell Williams, Prairie View A&M University

Dr. Carolyn Williams, Prairie View A&M University

Appendix B: Kick-off, precinct, focus group participants

Waller County Strategic Planning Breakfast Kick-off

Attendees

Reginal Smith, LJA Engineering

Sheriff Glenn Smith, Waller County

Jack Steele, Houston-Galveston Area Council

David Tinney, LJA Engineering

Fred Washington, Prairie View A&M University

Jarell Williams, Prairie View A&M University

Mayor Michael Wolfe, City of Hempstead

Dr. George Wright, Prairie View A&M University

Vince Yokom, Waller County EDC

Allen Younts, Waller County Auditor

Dr. Noel Estwick, Prairie View A&M University

Bianca, Prairie View A&M University

Kendra, Prairie View A&M University

Courtney, Prairie View A&M University

Mark Klein, Katy Prairie Conservancy

Wesley Newman, Katy Prairie Conservancy

Dr. Edna Eaton, City of Waller



Appendix C: Organizations contacted, reports and Plans reviewed

ORGANIZATIONS PROVIDING RESEARCH

Prairie View A&M University
Houston-Galveston Area Council
Texas Target Communities
Texas A&M Engineering Extension Service
Center for Regional Development, Purdue University

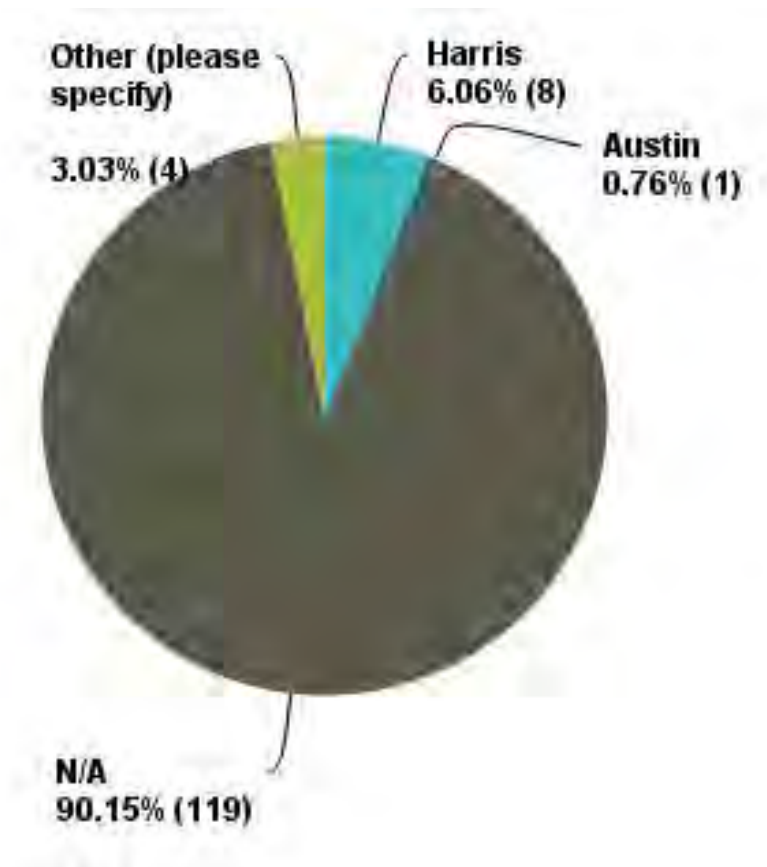


STRATEGIC PLANS

Burnet county Strategic Plan
Hays County Strategic Plan
Ventura County Strategic Plan
Eau Claire County Strategic Plan
Marathon County Strategic Plan 2012-2017
Brunswick Tomorrow Final
Chatham County Economic Development Strategic Plan
Dallas County Strategic Plan 2007-2017
Marathon County Strategic Plan 2012-2017
New Hannover County Strategic Plan 2011-2016
Pages from Peoria County Strategic Plan 2011
Pages from Prince George Economic Strategy Plan
Pages from St Louis EDP Working Strategic Plan 2014
Washoe County 2016-2018 strategic plan
Williamson County Strategic Plan 2010-2014
Peoria County Strategic Plan 2011
Prince George Economic Strategy Plan
Southern Tier Strategic Plan
Southern Tier Strategic Plan_Page_001.jpg
St Louis EDP-Working-Strategic-Plan-2014.pdf
St Louis Future-of-EcoDev-in-STL.pdf
Strategic Plan Report to Cumberland County 2014
Chatham County Economic Development Strategic Plan

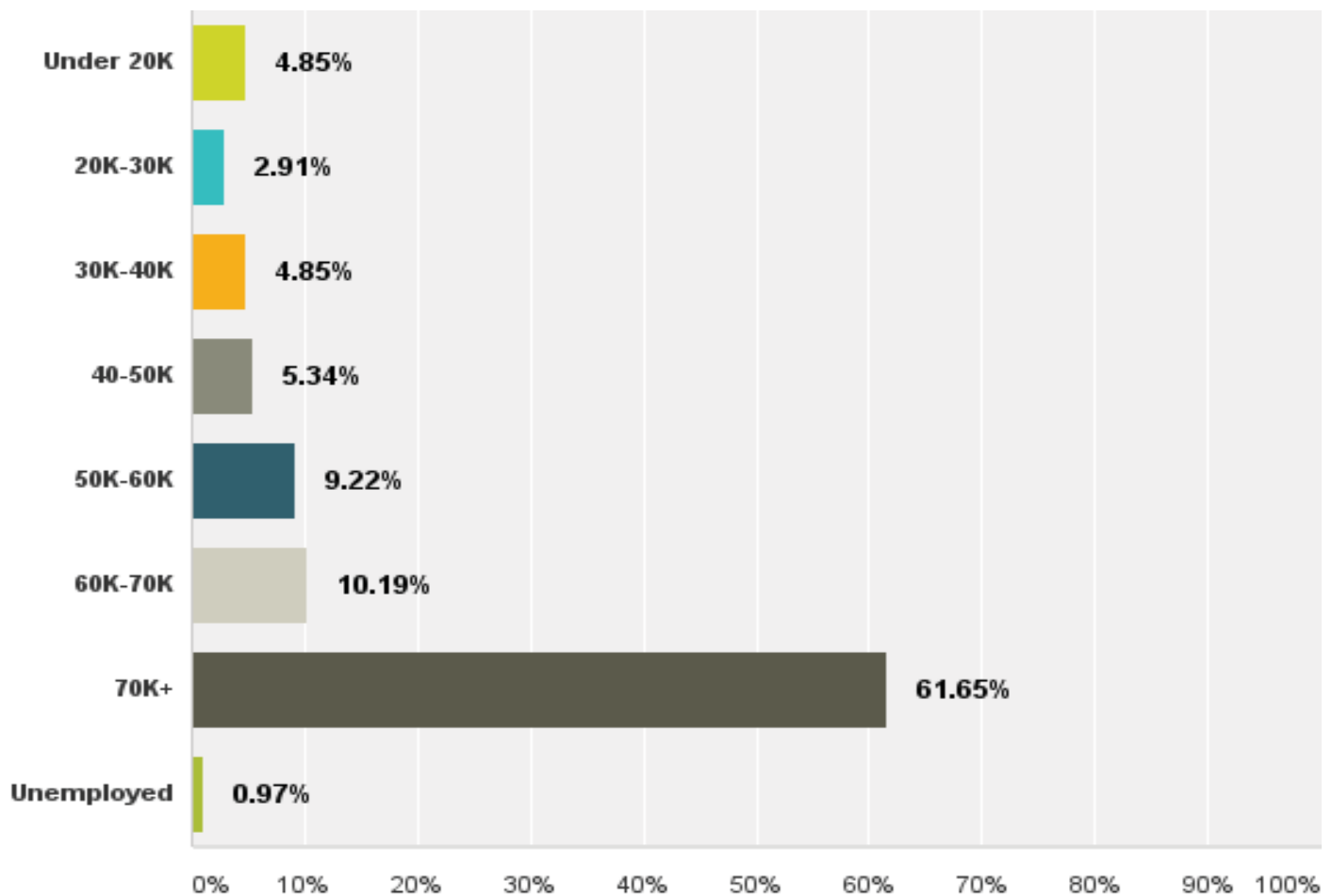
Appendix D: Survey questions and results

When nonresidents who were employed in Waller County were asked about their location of residence more than 6% indicated Harris County. 93 participants skipped this question.



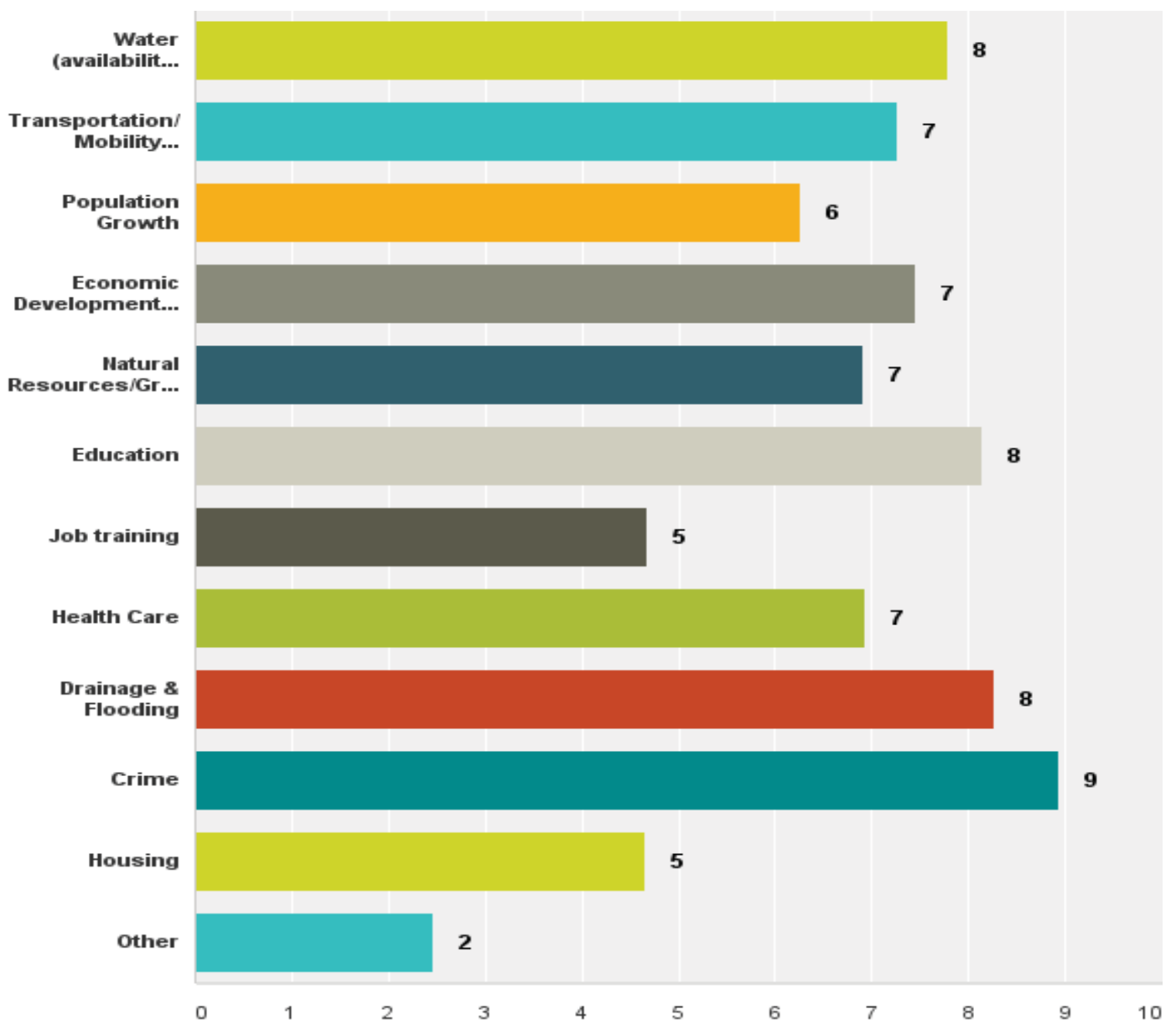
Appendix D: Survey questions and results

When participants were asked about their total household income more than 60% indicated that their income was above \$70k annually. 19 participants skipped this question.



Appendix D: Survey questions and results

When participants were asked to rank their county priorities in order of importance Crime was identified as the number one concern followed by Water, Education, and Drainage and flooding. The top 9 priority areas are what was used to guide the development of the Special Interest Group focus group meetings (SIG).

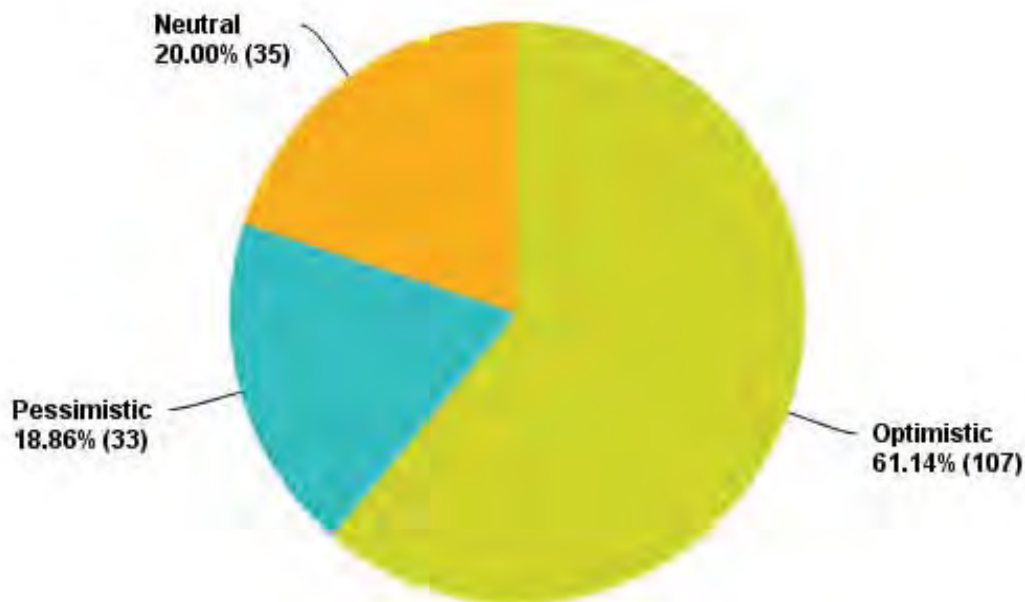


Appendix D: Survey questions and results

When the participants were asked about the strength of Waller County 19% indicated that the rural area was a strength equally followed by the community. 74 participants skipped this question.

When the participants were asked about the weaknesses of Waller County 12% indicated the county and 10% indicated the Roads. 80 participants skipped this question.

When the participants were asked about the opportunities that Waller County has 31% indicated Growth while 18% indicated Business opportunities. 98 participants skipped this question.



Appendix E: Project affecting the County

City of Katy

1. Drainage – lost 109 homes, 25 businesses from Cypress Creek flooding this year. Contracted with Castillo Engineering to conduct a Hydro Study. Once completed, plans need to be made to address retention ponds which could also be part of parks.
2. Cane Island development off I-10, building capacity with infrastructure and housing development
3. Boardwalk – 89 acre nature and water preserve with retail, eateries, hotel and conference center, patio homes, villas, walkable

City of Pine Island

1. Possible ice cream manufacturer and candy wrapping facility to be built
2. Possible project to build a multi-use pavilion and conference center near the fairgrounds

City of Waller

1. Received grant to revitalize City downtown - streets, sidewalks, walkability, etc.
2. Renovating community center, park development, parking lot & playground.
3. City of Waller mobility study underway - sidewalks, drainage, parking, roads, etc.

4. Possibility of new City Hall and City plaza – current city hall building is old.
5. Bond issue for infrastructure.

City of Brookshire

1. Plans underway to develop a strategic plan for the city
2. Hotel construction
3. Subdivision being planned in community – 300 home subdivision
4. Plans to build a new fire station to replace the old station

City of Hempstead

1. Potential housing development can make a significant impact on the County

Economic Development Focus Group

1. Ongoing commercial development along I-10

Housing Focus Group

1. Commuter Train
2. High speed rail
3. Land fill
4. 36A
5. 290 Expansion
6. Daikin acquiring housing for Employee
7. Projects affecting the County

Infrastructural Focus Group

1. Large residential developments along FM 1488 and around Katy

Appendix E: Project affecting the County

Health & Diseases Focus Group

1. AHEC East and smoke free Hempstead in restaurants and smoking cessation programs.
2. AccessHealth New Access Point and New Services
3. Clean up and recovery from the floods
4. Prairie View projects and revamping the campus
5. TAMU cancer grants and work in the community- cancer screenings
6. The proposed landfill and long term effects.
7. Communities that Care
8. Community Centered Health Home
9. Progressive Farmers' Safety Day – injury prevention for children
10. County Child Fatality Review Team



Park and Open Space Focus Group

1. Various highway and major thoroughfare projects, drainage infrastructure, and residential and commercial development.

Public Safety and Crime Focus Group

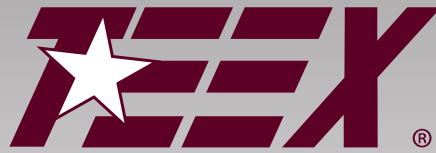
1. Implementation of High-Speed Rail
2. Development of three new apartment complexes in the City of Waller
3. Estimated population growth in the next 10 years
4. Several new businesses moving to Waller County

Transportation Focus Group

1. H-GAC sub-regional study; beginning in January 2017
2. I-10 Expansion from Brookshire, TX to Sealy, TX; Beginning in January 2017
3. TxDOT Hwy 36A Feasibility Study



TEXAS A&M ENGINEERING



EXTENSION SERVICE

P.O. Box 40006
College Station, TX 77842-4006
877.833.9638
teex.org



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